

Case Study Method in Management Development

A Practical Guide and Reading List

by Roy Winterburn



Commonwealth Secretariat

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Management Development Programme

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**Printed and published by
The Commonwealth Secretariat**

**May be purchased from
Commonwealth Secretariat Publications
Marlborough House
London SW1Y 5HX**

ISBN 0 85092 250 X

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PREFACE

In 1981 the Commonwealth Secretariat published 'The Case Study as a Training Method', which was an annotated bibliography. Since then, it has continued to support the use of the case method for management development programmes, because of the benefits it can give: the close simulation of reality, with the consequent introduction of feelings, values, discussions, and critical judgements - all characteristics which help the development of managerial competence.

To continue this support, it was felt that an updating of the 1981 bibliography would be of value, but that it should additionally give some guidelines on the writing and the running of cases. This present book is the outcome, but the emphasis in it has been reversed. Its principal purpose is to help those who would like to use the case method, but are constrained because of a lack of experience with it both personally and within their institution or country.

It has been assumed that many cases will need to be developed from book and journal resources: to assist this, other than the references to cases and the case method, there are sections on public administration (to help update the 1981 bibliography); on training in general; and on women. This last set is included in that it is one of the disadvantaged groups in developing countries to which the Commonwealth Secretariat is devoting much concern and attention.

The Commonwealth Secretariat is grateful to Ron Brown, who initiated this project, and to Roy Winterburn and The City University for the use of their time and facilities in completing it.

One aspect of the Management Development Programme is the development of teaching and training techniques and materials which are relevant to managerial issues and which can be used on a local basis. Publications such as this one are intended to meet practical needs, so comments from users and ideas for improving the layout and content are always welcome.

MohanKaul
Director
Management Development Programme
Commonwealth Secretariat.

June 1987

THE AUTHOR

Roy Winterburn is a lecturer at The City University, London, where he is involved in staff development and post experience vocational education. He graduated as a metallurgist at Surrey University after having done an industrially-based sandwich course; after a period in industry, he did post-graduate work in education. After ten years lecturing in metallurgy, he transferred to educational technology in 1976, and has worked in that area since.

He uses various types of case study in the courses he runs, and is particularly interested in their applicability to subject areas in addition to management development, and in the teaching and learning aspects of the case method. He is the organising secretary of international conferences which are held about every eighteen months on case method research and case method application.

ACKNOWLEDGEMENTS

I would like to record thanks to all those, both individuals and institutions, who guided, contributed to and helped in the preparation of this booklet. It would be invidious to indicate the degree of assistance, so I hope they will all accept a purely alphabetical listing, together with my sincere thanks.

Administrative Staff College, Jamaica
Administrative Training Institute, Nainital
Australian Administrative Staff College
John Berridge, UMIST, England.
Ron Brown, Commonwealth Secretariat
Civil Service Institute, Singapore
Council for Educational Technology, London
Gopabandhu Academy of Administration, Orissa
Linda Human
International Centre for Public Enterprises in Developing
Countries, Ljubljana
International Institute of Administrative Sciences,
Brussels
Mohan Kaul, Commonwealth Secretariat
Ritva Liljamo, FINIM, Finland
National Academy of Administration, Mussoorie, India
Barra O Cinneide, NIHE Limerick, Ireland
Clifford Odaet, Makerere University
Public Administration Training Centre, Dhaka
Public Service Commission, Western Samoa
Walter Rohn, Deutsche Planspiel-Zentrale, F.R.Germany
Elmar Stuhler, Technical University, Munich, F.R.Germany
Maud Tixier, ESSAC, Paris, France
University of Malta
University of Nairobi
Western Australian Institute of Technology

A-The Case Method

SECTION 1

WHAT IT IS

001. Batty, J. (1966). Management Accountancy. 2nd Ed.
MacDonald & Evans, London, England.

....the written procedures followed or problems being encountered within a business.

002. Bligh, D.A. (1971). What's the Use of Lectures.
D.A. and B. Bligh, Briar House, Clyst Honiton, Exeter,
Devon, England.

Case discussion - real or simulated complex problems are analysed in detail for students to suggest their own solutions or decisions.

003. Easton, G. (1982). Learning from Case Studies.
Prentice-Hall International, Inc., London, England.

A case, short for case history, is a description of a situation.

004. Ellington, H.I. & Harris, D. (1986). Dictionary of Instructional Technology. Kogan Page, London, England.

Case study: an in-depth examination of a real life or simulated situation carried out in order to illustrate particular characteristics - either characteristics specific to the case being studied or more general characteristics of the wider set to which it belongs.

005. Encyclopaedia Britannica.(1979). Encyclopaedia
Britannica Inc. Benton, Chicago, Illinois, U.S.A.

Case study, method of studying social phenomena through the analysis of a particular set of circumstances. The case may involve an individual, group, institution, process or community, or any other social unit. Everything relevant to the case is studied in an attempt to make an intensive and detailed analysis. Case studies are widely used in teaching law, business and public administration. They are also used in scientific research, though they have been called unscientific because they do not develop testable generalizations. Case studies, however, may provide preliminary categories and variables that can then be tested statistically. Generalizations from statistical analyses may also be examined in detail through individual cases.

006. Gordon,P.&Lawton,D.(1984). A Guide to English Educational Terms. Batsford Academic and Educational, London, England.

Case study: a method of teaching in which a situation is presented to students by means of film or document as a basis for discussion.

007. Kletz,T,A.(1970). Putting Knowledge to Use. In,
Education in Chemistry, 7 (6) p.229.

Essentially the case study method consists of a particular example (what it is an example of depends on the subject). It usually involves consideration of an actual example requiring the synthesis of a large amount of different kinds of information, and the making of recommendations or decisions. It is applicable in law, medicine, education, business studies, politics, English or any subject that studies the making of decisions. Because it is appropriate for the study of complex interactions of principles, it could be used by teachers in almost any subject. It is useful for demonstrating the application of principles for practising the analysis of complex situations.

008. Page, G.T. & Thomas, J.B. (1977). International Dictionary of Education. Kogan Page, London, England.

Case study - 1

2 Used particularly in management education and training. The presentation, sometimes involving role-playing, of a true or synthesized situation to develop the judgement of students who evolve and propose possible solutions, either individually or in groups.

009. Reynolds, J.I. (1980). Case Method in Management Development. International Labour Office, Geneva, Switzerland.

....a short description, in words and numbers, of an actual management situation.

THE CASE METHOD - SECTION 2

TYPES OF CASES

There has been a tendency for the case study method of training or teaching or learning to be regarded as a tool for training in the business field - indeed, at one time there was a supposed attempt in a book to claim the case method as a product of the Harvard Business School and that the right to market such cases was the exclusive right of that institution.

As can be seen from the definitions quoted though, this is a very restrictive view, and it can be considered as a method for practising problem solving which is applicable in any subject which has problems - the answer may be a single one, a variety of possible options, or there may be no answer at all.

We shall, though, in this booklet be looking at the use of the case method predominantly within the area of management development - that is, keeping to the more traditional area for the use of the case study - but the reference sections are subdivided into

- references on the case method itself
- references on training, including the case method
- references on public administration
- references on the position of women in society.

This last-named section is included as being of current interest and concern to the Commonwealth Secretariat.

There are several major skill areas which it is claimed that the case method can help to develop; Easton suggests they can all be described as contributing to creative problem-solving. These are considered in the next section, 'Why Use Cases?'

Attempts have also been made to categorize cases into particular types, though Culliton has suggested that

"...there is no such thing as the case method. The term has many different meanings - at least as many as there are people using it, and probably more."

Two contrasting examples which have been suggested are those of Simmons, who classifies by type of case, and of Tixier and Berridge, who subdivide them by reference to the purposes they are intended to fill; their groupings are given in Table 1.

| Simmons | Tixier and Berridge |
|---|--|
| exercise cases situation cases complex cases decision cases in-tray cases critical incident cases sequential cases role-play cases | learning need method concept illustration method consultancy method research material method the interesting or oddball situation |

Table 1: two examples of the classification of cases.

Simmons expands his classifications as follows:

The EXERCISE case.

where the application and practice of particular techniques is needed, particularly quantitative techniques. Suggests this type develops technical and analytical capabilities.

The SITUATION case

describes (fairly clear) issues in events which are either successes or failures, but the issues are often not those stated by the characters in the case, so that such statements need to be looked at critically in the light of other evidence.

The COMPLEX case

a situation case where the problem is to diagnose the underlying issues, which are difficult to distinguish as they are mixed with a number of other interdependent but superficial issues in a mass of irrelevant data.

The DECISION case

requires the learner to analyse a situation, exercise judgement and make suggestions as to what to do in the circumstances described. Essentially, a decision has to be made in the light of uncertainty. This also

requires the formulation of an action plan.

The IN-TRAY case

a variation of the decision case consisting of documents which an administrator might find in the in-tray. Some background information is provided and the learner is allowed a limited - though usually inadequate - amount of time in which to determine and record action to be taken on each of the documents. This is intended to develop administrative and managerial skills.

The CRITICAL INCIDENT case

an item of information is provided about a situation. If the learner then asks the right questions, more data is supplied, in a variety of possible forms, and the case situation can be understood, perhaps leading to suggestions for action.

The SEQUENTIAL case

The action is stopped at a critical point in the story and the learner is required to predict outcomes or suggest courses of action. The story is then continued and the reasons for any differences between the forecasts and what actually happened are analysed.

The ROLE PLAY case

is in effect a 'live' case study. A player receives an outline of the role that has been agreed will be assumed, and the characterisation of the role is then developed as the player sees fit. Once the characterisation of the role is developed, it cannot be changed while the game or role is in progress.

N.B. An alternative description of the 'live' case method is that it is a report of events that have just happened or are still in process. This should be compared with the so-called true live case method (as described later in this section).

These should be contrasted with Tixier and Berridge's classification for the identification and generation of case material:

(a) The LEARNING NEED method

centred on the requirement to develop material which will allow students to acquire or increase a skill.

(b) The CONCEPT ILLUSTRATION method

in which the case teacher fulfils a need to illustrate, operationalise (perhaps to simplify, perhaps to deepen) a concept, so that students can apply an abstraction to concrete instances.

(c) The CONSULTANCY method

in which very realistic and topical material can be presented to students as a means of simulating "sharp-end" situations and inculcating suitable attitudes and beliefs, often of a deterministic nature.

(d) The RESEARCH MATERIAL method

in which research data are presented to students in the hope of developing insights through joint teacher-student analysis.

(e) The INTERESTING or ODDBALL situation

which may have proved insoluble in practice, and which is written up as a case which provides a challenge to students. It does not merit the label of a "method".

"The extent to which a particular method of case generation is used will reflect variation in the definitions of students' needs, as shown in Table 2 overleaf.

There are a variety of ways in which cases can be classified; those given above are merely examples, not definitive categorisations. Further cases and types of cases are continually being developed. Leenders and Erskine state that,

"New cases are as essential to the case method as new blood to a donor clinic. There are many reasons for the continuing development of new cases. Cases become obsolete. Student and faculty interest can be maintained primarily with current material. New

| Type of case | Definition of students' needs | Most commonly used in |
|--------------|--------------------------------------|---|
| a | Pragmatic, practical problem solving | Vocational training |
| b | Abstract, conceptual, analytical | Higher education |
| c | Pragmatic, practical problem solving | Aggressive business cultures |
| d | Abstract, conceptual, analytical | Higher education |
| e | Difficult to categorise | Vocational education (but may be unteachable) |

Table 2: Areas of use of cases in Tixier and Berridge's classification.

problem areas, new theories and new subject approaches need to be exposed. All cases are dated. The environment within which the organization exists changes after the case has been written".

An example is the true live case method, devised in part to combat the lack of practical effect the correctness or otherwise of a decision might have. A live case (in business and management) is usually a present and future oriented case, presented jointly by people from an organization and the trainer, and which focusses on present-day problems which have emerged in a real life organization and on which decisions need to be made. It encourages a greater sense of responsibility in that the trainees' proposals may be of sufficient value to the firm for them to be implemented.

SUMMARY

Classification of cases into types may constrain you; it is better to decide what your objectives are for your participants, what you hope they will gain from the use of a case, and only after that might you see whether any particular type meets your needs.

SOURCE REFERENCES

Those reference numbers marked with an asterisk, e.g. 003*, have abstracts given in the 'Abstracts' part of this booklet.

- 061 Culliton, J.W. (1973). Handbook on Case Writing. Asian Institute of Management,
- 003* Easton, G. (1982). Learning from Case Studies. Prentice-Hall International, Inc., London, England.
- 010* Kralj, J. (1985) The live case method for teaching, consulting and research in business studies and management. In, Winterburn, N.R. (Ed). Proc. 3rd Int. Conf. on Case Method Research and Application. Centre for Continuing Education, The City University, London, England.
- 011 Leenders, M.R. & Erskine, J.A. (1978) Case Writing: the Case Writing Process. University of Western Ontario, London, Ontario, Canada.
- 012* Simmons, D.D. (1975). The Case Method in Management Training in Management Development and Training Handbook ed. Taylor, B. & Lippets, G. McGraw-Hill, Maidenhead, England.
- 013* Tixier, M. & Berridge, J. (1985). Cultural Transfer in Case Study Usage. In Winterburn, N.R. (Ed). Proc. 3rd Int. Conf. on Case Method Research and Application. Centre for Continuing Education, The City University, London, England.

THE CASE METHOD - SECTION 3

WHY USE CASES?

Learning can be regarded as the process of preparing to deal with new situations. It may occur consciously, or often unconsciously, usually from experiencing real-life situations, although simulated or imagined situations can also induce learning.

Thus, new situations and new contexts may help in increasing both learning and knowledge. The use of cases allows the introduction of new contexts which may correspond to real-life situations. Consequently, many complex interrelationships may be better understood and much knowledge may be gained because issues are dealt with in their context and environment. Learning becomes more useful and effective, in that it consists of much more than just the translation by the learner of an input into an output. Essentially, cases are assumed to favour integrative and systemic thinking, corresponding to the higher-order cognitive skills of Bloom's Taxonomy.

Hofer and Schendel mention that different types of business require different strategies; getting exposure to different industries and to different situations within important time limits helps, they suggest, to give an appreciation of the limits imposed by incompleteness of information, ambiguity of many situations and lack of time available. This is why the case method has become a popular method for learning business and management skills; it has been used to attempt to develop skills and knowledge through the analysis of an actual situation needing a solution. Cases are presumed to allow for realism, including feelings, values, discussions and critical judgements - all characteristics which help the development of managerial competence.

It has been suggested that if it is believed that the students should experience for themselves the intricacy, excitement and perplexity of acquiring and practising knowledge, then the use of the case studies must be considered. Teachers and trainers who regard the learning of their students as being important will, it has been

argued, favour the use of the case study approach because of its presumed benefits.

There are also a number of perceived weaknesses in the case method, though the challenge is sometimes as much for the content of the cases as for the method itself. Argyris believes that it "may act paradoxically in that though it is a method of instruction designed to enhance individual and through that organisational double loop learning, it may inhibit both by reducing double loop learning ." (Doubleloop learning = detection and correction of error plus changes in underlying policies, assumptions and goals, as opposed to single loop learning which assumes error correction but no accompanying change).

There is an approach suggested to solve cases, which might seem too rigid and which reduces the 'inspirational' phase of the solution produced. It can be argued that sometimes cases are no better than a good problem - probably mostly when cases are not discussed thoroughly. There are undoubtedly some concepts which are learned more easily through problems and examples, or by other methods, than through cases ; the use of cases as the sole method of teaching is certainly not to be recommended - it is but one technique among many - but for certain types of learning it is regarded as invaluable. Whatever the type of learning situation, cases could be used; however, they might not correspond to the best method available.

It has been suggested that the emphasis placed on results in cases makes them less oriented towards ethics, but the various aspects and information included in cases leaves room for flexibility. It is the trainer's approach and priorities rather than just the actual content of cases that should be seen as significant.

The evaluation of the performance of the case method as compared with other teaching methods is important. Understanding better when the case method is appropriate and how well it aids learning would be of value. So far, though, to a large extent a positive answer with regard to benefits has been taken for granted by the users of the case method.

If we consider the instructional functions as classified by Klingsberg, the appropriateness of case studies for each of these can be suggested:

MOTIVATION AND PREPARATION for the new topic by e.g. showing the relations between the old and the new knowledge and explaining the importance of the new topic.

A motivational case should break false illusions and a wrong reliance on one's (insufficient) knowledge.

ORIENTATION to the structure of the topic and objectives of learning. This includes the basic principles, key concepts and the logical model of the topic in a nutshell.

A case study may not be appropriate for this.

TRANSMISSION OF NEW INFORMATION and its processing in order to acquire a full understanding of the topic.

Cases certainly depend on the processing of new information as a basic function, but there is not necessarily any consequent understanding of the underlying principles that the case is meant to illustrate.

REVIEW AND REINFORCEMENT of the key points of the topic.

Can be achieved by use of a well-designed succession of cases.

SYSTEMATIZATION, i.e. reflection, emphasis on the important points and integration of the material into a coherent scheme of concepts.

This may be achieved by some of the participants by themselves, but depends mainly on the quality of the discussions which accompany and conclude the case.

EXERCISE AND PRACTISE means development of skill, so that newly learned cognitive models are transferred into operations.

A case study is suitable for this, and should be designed so that the theoretical concepts and logical structure of the topic can be discovered.

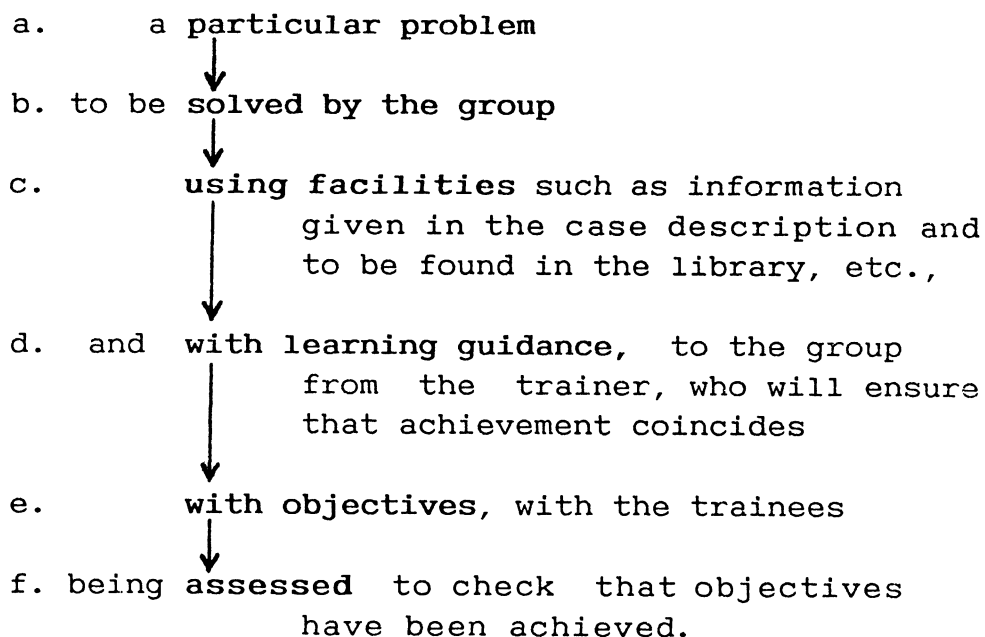
APPLICATION - use of the learned knowledge and skill independently in new situations and problems outside the teaching/training context.

Cases can be used, preferably taken from the learner's environment and in real conditions rather than in the classroom.

CONTROL - the critical evaluation of the acquired knowledge and structure, its comprehensiveness and usefulness; and critical evaluation of the learning.

Tests, examinations, critical assessments, self-evaluation, practical application, etc.

The case can be considered as a teaching-learning or a training-learning situation which has a sequence of involvement, in that there is



This representation of the situation is rather a static model; it indicates only the constituent elements. The training-learning process is, though, very dynamic, with learning occurring by interaction between a, b, c and d (e and f are generally fairly fixed). When organising these four elements, attention must be paid to the process of learning and to the process of problem-solving.

On the basis of learning theories and of suggestions in the literature, together with observations of the behavior of teachers and students while running cases, van Woerden has developed a provisional case format for teachers, to be used for the design of a course, based on the case method of teaching. The first two phases, dealing with the

| |
|---|
| <p><u>1. Feasibility study</u></p> <p>a. What are the course objectives, and how do they relate to the overall programme objectives?</p> <p>b. Is the case method the most appropriate teaching method for attaining these objectives?</p> |
| <p><u>2. Design</u></p> <p>c. What previous knowledge and skills must the student and the teacher have?</p> <p>d. Which specific objectives must be achieved by the case? What type of case is best suited to achieve these objectives?</p> <p>e. What are the (external) constraints and (internal) starting points to be considered when using the case?</p> <p>f. How are the following tasks to be structured</p> <ul style="list-style-type: none"> -motivating students (to the problem-solving tasks) -aligning with the initial level (of knowledge and skills) -providing insight into the objectives -orienting the student in the problem-solving tasks (to make the student's knowledge operational) -giving opportunities to practise the different problem-solving tasks -providing feedback -assessing results? <p>g. What (approximately) are the content and presentation of the case?</p> |
| <p><u>3. Planning</u></p> |
| <p><u>4. Writing</u></p> |
| <p><u>5 Use</u> (including evaluation)</p> |

Table 3: van Woerden's case format course design.

core of the teaching-learning process, are given in Table 3 above.

Though these formats are designed on the basis of theories of learning processes and of problem-solving processes, there is a place for experience to be incorporated into both formats. Even so, some applications of learning theory can be of help to you as a trainer. It has been

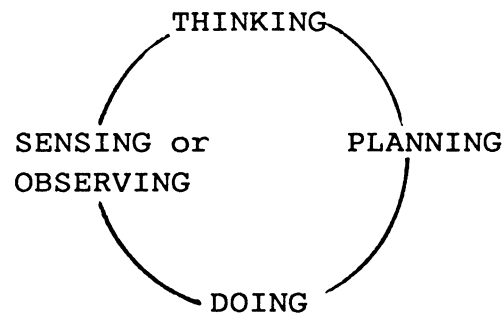
suggested that different trainers can use an identical technique and claim to be involved in the same process and yet seem to provide quite different experiences for an individual learner; an individual trainer can appear to give quite different learning experiences to different learners in the same group.

These factors are a function of different learning styles, and it can be useful to determine the learning styles of your trainees, or at least to take into account the different styles which have been identified. Kolb's Learning Style Inventory Test (LSI) is often used, in which Kolb conceives learning as a 4-stage cyclic process, and for learning to be effective a learner:

- a) must be involved in new concrete experiences (CE);
- b) must be able to observe and reflect on these experiences from many perspectives (RO);
- c) should be able to create abstract concepts (AC) that integrate observations into logically sound theories;
- and d) should be able to apply ideas by active experimentation (AE).

All four abilities are considered essential, with no one in principle more desirable or more useful than the others. His 'labels' for abilities and for identifying them have been regarded as too academic, and it is difficult to differentiate between AE and CE - CE is liable to show considerable inconsistencies, and manual, physical and motor skills do not appear in the vocabulary of Kolb's model - so you may find that the variant devised by Juch is of more use to you.

Juch's Learning Profile Exercise (LPE) is an attempt to clarify and make more appropriate the terms for the four abilities and, more particularly, the determination of them; he uses the words



and he puts forward the suggestion that that the four quadrants of this learning cycle correspond in many respect with education (sensing and thinking); teaching (thinking and planning); training (planning and doing); and instruction (doing and observing).

These he defines:

EDUCATION - (in its organized, institutionalized and contrived forms, it generally means)the up-bringing of young persons:

TEACHING- (mostly means) presenting useful principles and generalizations to pupils,explaining the basic laws and rules that are valid and useful in the concrete world of things and people:

TRAINING - (for the trainer) it means arranging opportunities and resources in such a way that physical and operational skills can be acquired or improved.

INSTRUCTION- to improve behavioural operational skills through telling and showing how-to-do-it.

He suggests that each of these modes is potentially of equally great value, but that education and teaching put an emphasis on thinking, while training and instruction stress doing. None of these give as much attention to the observing/sensing or the planning aspects, and he proposes that there should be much more explicit education, teaching, training or instruction done with respect to skills at these stages.

The case method does require participants to be active in all four stages of the proposed learning cycle of sensing or observing (studying, finding facts, evaluating, reviewing); thinking about these things (reflecting, analysing, creating ideas); through planning (discussing, working out ideas, proposing); to doing (testing outand applying ideas, practical experience).

However, your case study participants may not be prepared for these activities, and this aspect is considered further in the section on running cases.

Other methods of teaching/training/learning could also be said to deal with the stages of the learning cycle, so are there any other factors which can help us to decide on the

appropriateness or otherwise of the case method for particular teaching/learning situations. How are you to decide what is appropriate? Are there any helpful guidelines, comparisons, or evaluations of the case method with other methods?

Dooley and Skinner differentiate the use of the case method along three broad dimensions:

- a. the educational objective;
- b. the pedagogic philosophy and convictions of the instructor, including
- c. views regarding the instructors' and students' classroom roles.

They state that the case method is 'poor' for developing concepts, but 'excellent' for acquiring skill in analysis for business problems. They don't elaborate why the case method is good for one and poor for the other.

Reference to learning taxonomies, of which Bloom's is perhaps the best known, may be of value in that the case

| |
|---|
| <p>ANALYSIS OF THE SYSTEM establishes the formal organizational relationships and the informal relationships between people concerned with the problem.</p> <p>ANALYSIS OF THE OPERATIONS carried out such as production or information processing needs detailed flow-charting, preliminary estimation of production rates, identification of bottlenecks, etc.</p> <p>ANALYSIS OF THE FACTORS IN THE ENVIRONMENT which may affect the system needs basic knowledge of political systems, competitive features, labour markets and customers.</p> <p>BASIC STATISTICAL SKILLS needed to make a preliminary analysis of the available information - tabulating data, graphing, doing simple statistical tests.</p> <p>COMMUNICATION SKILLS are needed to present proposals, including giving oral presentations, writing reports, and interpreting clients' knowledge and motivation.</p> <p>KNOWLEDGE OF BEHAVIOURAL ASPECTS of organizations is needed in preparing proposals for implementation of change.</p> |
|---|

Table 5: skills needed for operational research cases.

method can be equated with the various levels of knowledge or skills in the taxonomy that it ought to develop.

Luck and Walsham define the skills which need to be practised when dealing with cases on operational research as shown in Table 5.

Reynolds states that the rigorous analysis required, especially in the longer and complex cases, is said to develop the skills of logical thinking, of searching for relevant information, of analysing and evaluating facts and of drawing conclusions needed for managerial decisions. He also claims that the experience it gives in arguing a viewpoint before one's peers develops the ability to communicate clearly, to consider the views of others and to arrive at solutions that would gain collective support. Unfortunately, it does not appear to have been shown at all conclusively that the skills needed and said to be developed are developed, or that the case method develops them better or faster than other techniques.

A critical view has been put by Argyris, who found that the case method, as used by others when he was observing its use, included other methods - lectures, role-play, simulations, films - and posed the question that if the case method includes them, how is it different from them?

On a practice-oriented basis, the so-called 'active' teaching-learning processes tend to be regarded as techniques suitable for practising problem-solving, and casework, roleplaying and simulation games tend to be used a lot. Rohn has prepared a table (see Table 4) which compares the qualities of each of these three methods in respect of a number of educational characteristics, so as to help in deciding which teaching/learning method could be the most appropriate in a specific learning situation. As these characteristics are on occasions complementary, a mix of methods might be the most suitable in certain learning situations.

Apart from the comparison of the case method with games and with simulations, very little seems to have been done to contrast it with the other techniques which are available. The only one reported of any rigour is that done by Stuhler in juxtaposing the case method with the lecture method: the principal characteristics found were that the case method instilled very positive attitudes

| | | | |
|----------------------------------|---|--|--|
| 1. TYPICAL STRUCTURE | Interdependent business/economics/mathematics; quantitatively based. | Description of a 'real life' situation incorporating a problem. | Definition/description of a 'role'. |
| 2. OUTCOME | Decision-free connections. | Alternative decisions. | Single decisions. |
| 3. OPERATING CHARACTERISTICS | Dynamic and logical | Static. | Useful as a model. |
| 4. FLEXIBILITY | Gaming and modelling flexibility | Solution flexibility | Role flexibility |
| 5. CHARACTERISTICS OF INPUT DATA | Selection of all 'relevant' major influential material for the chosen model. | Appropriately complete presentation of a 'real life situation'. | Individual description of a 'role'. |
| 6. COORDINATION OF DATA | Interdependent. | Coherent presentation of the 'problem'. | Individual briefing on 'role'. |
| 7. DATA AND INFORMATION INPUT | Quantitative (numerical) and dependent information. | Definition of the problem. | Prescribed role. |
| 8. PRODUCT/OUTCOME | Calculated (numerically based) decision. | Solution capable of presentation and explanation. | Attitude/behaviour development. |
| 9. GAME AIM/OBJECTIVE | Best quantified decision. | Best solution. | Best discussion argument. |
| 10. SUPPORT MATERIALS | Computer or calculator plus graphs or tables. | Training materials based on case resolution (case method training materials). | Counselling with roleplay. |
| 11. COST/EXPENSE | High in time and basic costs, e.g. computer programming. | Medium in reaching solution, but high in case preparation. | Low cost in role formulation, cost variable with game length |
| 12. MOTIVATION | Very strong in relation to 'hands-on' experience, and understanding of financial decisions. Cognitive and affective effects. | Strong in working on solution as an individual; moderate in presentation in plenary. | Very strong in personal role; strong in relation to any observers. |
| 13. PARTICIPANTS' INVOLVEMENT | All participants very active. | Individual tasks and group work, very active. In plenary, variable | Roleplayers very active. Analytical observers active. 'Spectators' variable. |

Table 4: Matrix comparing and contrasting the learning aspects of STRUCTURED GAMES, CASE STUDY and ROLE PLAY as used in business applications (after Rohn).

towards its subject matter, and considerably more discussion by and among students; the amount of learning of the students did not always show greater amounts with the case method, but was certainly never less with it.

One of the major problems in this last study was accustoming students who normally were taught by lecture methods to the case method. Different learning methods and learning styles are involved, and you may find the same type of problem arising if your case participants are not used to the case method. Unless you prepare them for the change, you may find that using the case method does not give as much benefit as you had hoped.

SUMMARY

Cases are claimed to provide realism and in so doing to develop information-finding, logical thinking, analysis, evaluation, reaching conclusions, communication skills, feelings, and an appreciation of values; they are supposedly less good for developing concepts. Cases require active participation in all stages of the learning cycle, but verification that they develop the various skills mentioned better than other teaching/learning methods relies more on anecdotal than empirical evidence.

Problems may particularly be found if participants are accustomed to different learning methods and learning styles than those needed for the case method. There may also be a tendency to think through only as far as the 'solution(s)' without going on to examine critically the business, managerial, cultural, etc., criteria and objectives on which the case and the participants' thinking is based. Both of these two problems can be influenced by the capability of the instructor.

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B-Preparing & Compiling Your Case

SECTION 1

BEFORE YOU START

Preparation of cases is commonly referred to as case writing, (though a variety of other terms is also in use), but you should not assume that all cases consist entirely, or even mainly, of written material. Audio, visual and computer-based materials can be included and may sometimes form the great majority of the material in a particular case. We shall use the term case writing, though, to cover all the formats in which the case may eventually appear for use.

You need not necessarily write the entire case: you could find one already existing which meets your requirements; you could find one which you can adapt to meet your needs; you might be lucky enough to have some material broadcast on radio or television which you could use as the basis for your case - and so on. The possibilities are wide, but don't get too fond of the material you prepare yourself; always look at it with a critical eye, and be prepared to take the sometimes necessary but always hard decision to discard any parts which aren't appropriate.

As is emphasised in the section on cultural effects (see p. 52), cases tend to be written in different ways and for different purposes in differing educational cultures, and some such bias will no doubt also be evident in this booklet.

Cases are most commonly used in managerial, medical or legal studies, but they are applicable for any area of study which involves the solving of problems - more usually, creative problem solving.

Cases are one way of providing a simulated environment in which to practice and develop these problem-solving and decision-making skills. Being simulated, participants are under little pressure; a wrong decision has no more realistic effect than a right one, which has been a major weakness of the case method, and gave rise to the live case method.

The degree of reality of cases in a simulated environment can vary depending on the technique for developing cases. As you change your methods from collection and ordering of published material; to observation; to research, or consultancy, or the live case method, the increasing amount of insights that these give you can have considerable benefits on your case writing.

Case writing can be regarded as a skill which is similar to other kind of writing. Most writing is underpinned by some form of basic structural design and shape which the writer will in part follow, in part deviate from according to ability, need, or the unexpected events that go with the act of writing. Planning, though, must be a deliberate forerunner of the writing.

The main constraint generally emphasised is the need to ensure that all the material included is as factual as possible, and does not include the writer's ideas, thoughts, perceptions or interpretations of events.

Whether the case is invented, or formed from the collation of published material, from observation, from research, or from consultancy, it is generally assumed that there is a need to maintain an objective rather than a subjective stance. As these types of derivation tend to give increasing reality to cases, the maintenance of this objectivity can cause considerable difficulty: the case also tends to become more and more culturally specific, (a factor which is mentioned again on page 52), and perhaps limited in the subjects and language considered as suitable:

.....the writers of cases are usually drawn from the intelligentsia.....the effect....cases which reflect humanistic values, responsible business ethics and suitably serious and complex subjects for analysis. It is only on relatively rare occasions, however, that cases are written on the subjects of alleged unethical behaviour by organisations....or of supposed graft and corruption. But these cases are usually written from secondary sources, with academic caution and selectivity on the issues included in the text. On issues which are considered indelicate, such as blackmail, fraud, grossly immoral behaviour, the press assumes the role which the case writer could perform if he wanted to

portray a representative range of all the many facets of business. Also the language and format of cases reflects such values of high mindedness: the reality of a business deal might well be not dispassionate prose, or well ordered polished factual exposition. (Tixier)

Despite the interest that some of the above types of case might create, they do pose especial problems for anyone coming new to case writing. The difficulties of avoiding bias, separating fact from rumour and gossip, and if necessary getting agreement from contributors to use such a case make it probably much better and simpler for you to stick to the conventional type of case.

Before the writing can start, though, the planning must be done. You will have considered the training needs of your participants, and the ways in which these can best be met. No doubt you will consider a variety of techniques, one of which is the use of the case method.

Cases require the participant to do a lot of hard work. But, because involvement is usually very high, far more effort is often put into cases than is devoted to other training methods -so great care must be taken not to waste this effort. Participants must be helped to learn the skills necessary to analyse cases, but must also understand why the case method is being used, and what they should get out of each case as far as their own development is concerned.

If this stage is neglected, some participants will learn some of the necessary skills, and some none at all - they may become bored, frustrated, angry, and unable or not willing to recognise the very real benefits which can come from using the case method.

Thus, you have a responsibility to those participating not only to prepare your cases as well as possible, but also to use them as effectively as possible.

When planning your case, then, you should be clear as to what the participants are to get out of it. Then you can start work on how you are going to devise a case which meets your, and their, needs.

PREPARING AND COMPILING YOUR CASE - SECTION 2

GETTING YOUR MATERIAL

The process of researching situations or problem areas for the purpose of creating cases involves developing case ideas, and then obtaining the relevant information. This can come from many sources such as from organisations, from interviews, from your own activities and researches in the field, from archive material (e.g. reports, journals, newspapers, books, and other print material; off-air recordings from radio or television; film and video; promotional materials; etc.), from informal discussions with friends, colleagues, consultants - your sources are really only limited by your ingenuity. The only source which it is probably advisable to avoid is yourself. Don't write a case from your own experiences - at least, not until you have had a considerable amount of experience in case writing - and don't put yourself in a case.

The personal interview is one commonly used technique to obtain the information that you need for your case, but in using it, there are some difficulties which can occur. Perhaps the main one is that the information derived from the interview may have some bias, and this can arise from two sources.

The first source of bias is the person whom you are interviewing. The distortion of facts may be totally unconscious - people often tend to provide either a better or a worse picture of a situation than that which actually exists, particularly if they are not in a position to have a grasp of the entire picture. This may also be a deliberate effect, for reasons of their own. You must be alert to the possibilities, and equipping yourself with as much background knowledge as possible before the interview can help in this. Using that can provide questions which allow you to probe further should you suspect that the responses you are getting do not agree with your prior information.

Alternatively, you may have formed opinions about the person, topic and/or organisation from your sources; you may take a dislike to the person you are interviewing, or suspect that you are deliberately being given faulty

information, both of which can colour your approach, questioning, interpretation and recording; and unless you do your writing up immediately after the interview, your memory may be selective - as time tends to distort information, the case writer always has to assess the reliability of the reporting. Data may be affected internally and externally by impressions, assumptions and biases of the case writer or the person being interviewed.

Simmons has given some useful hints to be borne in mind by anyone who intends to use interviewing as one of the data collection techniques:

1. Arrive at the interview on time and be prepared.
Prior information on the operations of the organisation is important since it provides a basis for asking intelligent and carefully worded questions.
2. Inform the interviewee of the purpose of the interview.
Since the interviewee may not be in a position to supply all the information you require, this will give the chance to refer you to others within the organisation who may be of greater assistance.
3. Give the assurance that the interviewee's comments will not be used or published without written permission.
4. Ask your interviewee whether you can take notes or use a recorder.
5. When taking notes, don't be so engrossed that you fail to give your full attention to the interviewee. The recording of key points surrounding the issue is advisable.
6. Give your full attention to the interviewee.
Make it evident that you are doing so. You are there to listen, not to say what you need.
7. Always remember not to express your feelings or to offer suggestions. Report what is actually being said rather than what you think has been said or what you want to hear.
8. Don't argue with the interviewee - this may bring an abrupt end to the interview, and also spoil your chance of obtaining another interview in the future.

9. Listen - don't talk - unless on a point of clarification.
10. Summarise what the interviewee has said and present it back for clarification. This is useful since it not only provides you with a clear picture, but may give the interviewee an opportunity to include any further important details that may have been overlooked the first time around. It also provides you with a chance to ask key questions pertinent to the underlying issues which may not have been touched on, or were evaded by, the interviewee.

Data collection also involves the use of all sorts of print material. This provides a vast resource, which may often be the main source for many case writers, particularly in countries where case writing has no established basis or is an unusual teaching/training technique. Some examples are:

- Daily newspapers, local and national;
- Weekly newspapers, local and national;
- General interest magazines and journals;
- Specialist magazines and journals;
- The cuttings libraries of all the above;
- Cuttings services;
- Encyclopaedias;
- Books;
- Government reports;
- Annual reports of organizations;
- Prospectuses;
- Special reports;
- Theses;
- Advertisements;

etc.

but again this is not intended to be a comprehensive list and you should add your own ideas to it.

Many of these types of sources will need to be cross-checked if at all possible, as they may have been edited or presented so as to give a particular angle, and thus will contain bias or distortion. Further, it may often be advisable to find out whether the material you gather from these sources can be used by you - check either with the (e.g.) newspaper whose report you are using, and/or the organisation that the report is about.

Observations can be made, and information gathered, directly by you being present and recording in one or more of a variety of ways whatever takes place. This is a flexible but difficult technique to use. The flexibility arises from your ability to note subtleties and nuances in behaviour or events, and to concentrate on particular aspects. Against this, though, there may be either too little happening, or too much, so that you miss information and you are left with an imperfect record that you try to complete at some subsequent time.

As with the interview, though, there is often no objection to making some sort of audio and/or visual record of the event. This may be, for example, a photographic, audiotape, film, or a videorecording technique, each of which can provide a less biased but two-dimensional record of the part of the event that they focus on, but which do not give a complete indication of everything which occurred. In fact, bias may be introduced because of imbalance between what they record and what they miss; they are dependent on what their operators regard or are told is important, unless a multi-unit or multimedia unit is arranged which will give as complete a record as possible.

Providing some form of record other than that dependent on an observer's written notes and memory does have considerable advantages not only for allowing you to analyse the events at leisure, but also for allowing your participants the same opportunity. Recordings can form a part of your case for them to work on, with the advantage of increasing the involvement. Such use is not yet common, but is certainly increasing - either on audiotape or, more commonly, on videotape.

Other advances in technological aids are increasingly being used when developing and running cases, and these are touched upon in the relevant section (see p.67).

PREPARING AND COMPILING YOUR CASE - SECTION 3

PUTTING YOUR MATERIAL IN ORDER

Your case presents a problem to the participant, with the intention that the participant solves that problem. There may be one 'right' answer, or there may be "better" answers among a variety of possible solutions. So, as with any other type of problem you present, you must ensure that there is sufficient information in your case for the participant to decide what is the (main) problem which needs solving, and what information the participant needs in order to analyse the situation and reach a decision.

This information should be presented in such a way as to allow the situation to be clearly understood: the opening paragraphs are important since they set the scene for the case. Many case writers start with a statement of the issue; if there is no clear issue, giving a lead in the first paragraph to the theme of the case will act as a useful guide to what the complete case is about, a point of reference to give meaning, direction and relevance to what follows. An example from Luck and Walsham might be their introduction to their "East African Railways" case, which starts;

The Mombasa Area Manager of the East African Railways Corporation is concerned about the delays in the Mombasa marshalling yard. He considers this to be a costly waste of time and resources. He has raised his concern with the Chief Engineer who is responsible for the design of a new marshalling yard. They have agreed that the Operational Research unit should look at the planned design and give their advice.

The O.R. unit has been requested to produce a preliminary report based on the existing system. The report should examine areas of concern and should advise whether further detailed work and data collection and analysis is needed to improve the design of the marshalling yard.

The O.R. manager has assigned you the task of preparing and presenting the preliminary report to the Mombasa Area Manager and the Chief Engineer.

You should yourself be very clear as to what the fundamental issue is, and whether there are any secondary issues which have a bearing on the main problem. Unless you are clear yourself what the main and sub-problems are, so that you are able to ensure that they are all included clearly, useful analysis and effective solutions are less likely.

The main problem and any sub-problems can then act as foci for the various items of information needed. The problem may not be presented quite so plainly at the start as it is in the "East African Railways" quoted above: for example, another case from the same source opens:

Walimu Consultants, management consultants based in Nairobi, Kenya, have been asked to carry out a study for the Wageni Agricultural Cooperative into the potential for horticultural development of the Chakula Estate.

Further aspects are introduced gradually, increasing the complexity of the case and providing possibilities for alternative proposals which need to be compared and evaluated.

Probably your most difficult decision when writing your case is how much information to include, and the way in which it is to be presented. Having perhaps taken a great deal of time and trouble to gather your information, you are understandably reluctant to discard any of it, but it is vital that you are selective with your provision.

It is very unusual in any real-life situation to have available only the facts which are necessary to solve a particular problem. There are generally far too many facts available, not all of which are relevant: or, a decision may have to be taken when there is really insufficient relevant information either available or possible to get, and an intuitive leap may need to be made. Avoid the latter with your first case - too much information, though time-wasting if carried to excess, is preferable to too little. You can progress to types which need intuitive leaps perhaps once you - and more particularly the participants - have got more accustomed to the method. Part of the task when reading your case will be to decide which facts are relevant and needed for a good decision and which are not.

The facts can be presented in a variety of ways - verbally, numerically, statistically, visually, aurally,

using the range of print and non-print media available to you. But not only must the facts directly relate to the problem be included: you will generally also have to provide participants with the background information that they need so as to be able to set the problem into its context.

Again, how this is provided is for you to decide, but too much infilling can have an offputting effect on the reader - you need to keep a reasonable balance between informing and overloading. Rather than providing written information, you may be able instead to give some references which will allow the background to be researched by the reader.

Presentation of your data will be eased, both for you and for your reader, if you group your information into a logical order. There can be no comprehensive guide to this, because the grouping will be very dependent on the type of problem, on your preferred way of writing, and on the type of sequencing you use. Because writing is such an individual skill, it is very difficult to suggest firm rules about the ordering and presentation of a case.

Your case is probably best written in several separate sections, each dealing with a particular aspect, which are then welded together to form the complete case. A structural unity should be aimed for, and in putting your materials into order, the following types of sequencing have been suggested:

- historical, or time, sequencing;
- event sequencing;
- logical argument sequencing.

Within any of these sequences, a variety of substructures has been proposed by authors. For example, Towl mentions

Time structure: because a case or decision takes place in time, there must be a fairly clear perception on the part of the student of what the time sequence was of the events taking place in the case.

Narrative structure: the things that happened and the circumstances of their happening must be narrated in some kind of understandable pattern.

Expository structure: the events and issues contained in a case must be explained so that the learners will have a comprehensive understanding of the situation and the meaning of the various concepts to assist them in their analyses.

Plot structure: the case writer must be able to capture the imagination of the audience without damaging the believability of the case.

The issue or issues: there must be a question of what should somebody do, what should somebody have done, who is to blame for the situation, what is the best decision to be made under the circumstances.....etc.

The more these can be interrelated, the more they will contribute to the interest and effectiveness of your case.

During all this, remember to keep your writing objective. One purpose of the case is to allow the participants to make the judgements, not for you to give yours. Your job is to present that case, not to interpret it or present your own opinions about it. Use adjectives sparingly, if at all, because they can introduce aspects of value judgements by you.

This does not necessarily mean that the you should avoid having people represented in your case; on the contrary. It is often easier, and makes for a livelier case, if you can include some convincing characters who may well be required to give opinionated information in the case - but these should be opinions culled from your research, quoting what you have gathered from interviews, etc. They are not included to be mouthpieces for your opinions.

It is generally assumed that cases are written and presented in the past rather than the present tense. Don't suppose from this that the present tense is never used; it can bring a great sense of immediacy, realism and vividness, particularly when quotations and conversations can be included. However, cases written in the present tense may soon age and lose their realism, and once this happens the lack of realism can become significant and divert participants from the purpose for which the case is being used - more time is spent trying to find faults in the information than in using that information for analysis and proposed solution(s).

PREPARING AND COMPILING YOUR CASE - SECTION 4

GETTING IT RIGHT

There is no edict, no hard and fast rule, about how long a case should be. If you aim for

clarity,
coherence,
completeness

and conciseness,

you should find that the length more or less controls itself. Cases can, though, vary from one written page upwards, and the longer they become, the longer it takes the reader just to absorb in the material. Where writers have given some indication of optimum lengths, this seems to be in the range 10-15 pages - above that, the feeling seems to be that their effectiveness decreases.

Help participants to sort out the material in your case by ensuring that every item has a reference number, and that a listing of all the items they should have or should refer to (e.g. a videotape which is held by the library) is included in the case paperwork. In this way they can check that they have everything they are meant to have; you can put charts, tables, etc., in appendices rather than bulking out the main part of the case; and you can indicate clearly what items they will need to refer to which are not in the main case pack, and where those items are to be obtained.

There is no merit in having unnecessarily long appendices: the function of these is to provide necessary information which does not readily fit into the main body of the case, but which is essential to the understanding of the case and the solving of any problems posed.

Once you have written your case, put it aside for a while - a day or two, perhaps - and then read it again. Read it critically, put yourself in the position of participants and see whether they would get out of it what you originally intended. Does it meet your objectives? Most writers find that they have to revise their original product, to refine it, and a second, third or fourth revision may be needed. This will pay off, though, when you try the case out for the first time,

So, keep your first case short. As you and participants get practice with the technique, you can become more ambitious. Good writing is hard, and needs a lot of care, and this applies to writing cases as much as to any other sort of writing. Unfortunately, there is no way of improving your case writing other than by writing, and then trying out, your cases.

SUMMARY

Know what you want to use your case for. Your information sources can include

- collecting and ordering published material
- observation
- research, e.g. interviewing,
- consultancy
- live cases.

Start your case by setting the scene and theme; give sufficient information to allow useful work and learning; present the information in a variety of ways but with coherent structures and sequences: make it factual, objective, as unbiased as possible, and write it in the past tense.

No particular type of style is needed other than to convey effectively the information, issues and problems that are to be dealt with in a problem solving/decision making process.

Use technological aids in preparation and presentation if they are helpful. Revise and refine as necessary.

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Those with reference numbers marked with an asterisk, e.g 029*, have abstracts given in the 'Abstracts' section of this booklet

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C—More Detailed Considerations

SECTION 1

THE CASE NOTE

Don't stop when you have finished preparing your case. More will be got out of your case, by more facilitators, if you go on to prepare an instructor's guide (which may be referred to also as a teaching note, trainer's note, case guide, etc., etc.).

The teaching note can help

- a) in the selection of cases when they are being reviewed for possible use, by giving the purpose and range of the case;
- b) in using a case, particularly if it is being used by someone other than the case originator. Suggested uses, possible questions (either to or from the trainer) and analyses may appear.
- c) in showing how a case relates to other cases should they be in a group with an overall purpose.
- d) in helping ensure uniform coverage if several facilitators have to operate on a shared teaching basis.

Any case which is prepared for use as training or teaching material will benefit from additional notes. These can be much more of a chore than doing the case itself, but are vital to the effective use of your case. It has been suggested that some think the term (teaching note) should be used solely in its strictest sense of teaching emphasis and contain information on possible teaching approaches only. It may be historical in form: 'we tried this, and the case was a great success'...It may be suggestive, directive or predictive. It could propose assignment questions. A further requirement might be suggesting where to use the case in a particular course with a specific audience.

Essentially, though, the training or teaching note is a guide. There is no set way of laying it out - format, style, content or degree of detail are all aspects for you

to decide on. As a guide, it should help you when you run the case, and also help anybody else who might make use of your case: its purpose is not necessarily to provide a solution, nor necessarily to give a detailed analysis of issues which might come out of a case study.

The case training note can include a wide range of topics in addition to the analytical process and the answer or range of possible answers. It may deal with the optimum amount of experience and competence the participant should have to get the maximum benefit from the case; the ideal group size; how much time it takes; the inter-relationship of the case with other cases; and similar matters of assistance to the facilitator.

The more complex the case you have prepared, the more valuable it is to have as full a set of notes as possible to go with it - even to the extent of the notes being longer than the case. Your case may offer the chance for it to be used in a range of different ways - role playing, negotiations, games, computer analysis, etc: good notes will give suggestions on using these different ways, with perhaps some comment on any actual experience you may have of using them in these ways.

Merging various suggestions as to what exactly is appropriate to go in the note gives the following composite recommendations:

Its objectives and place - the objectives of the case: how it fits in with other cases before it and after it in a particular topic and its relationship with the overall training course.

The participants - the level at which they should be in order to get the maximum from the case; what they should learn from the case.

Ways of using it - suggestions as to the way to use the case, with alternatives, and critical evaluations of the ways in which it has been used - when it worked well, when it didn't, and suggestions as to what helped towards the success/failure.

Questions - issues, teaching questions, study questions; facts relevant to those questions; useful sequencing of questions; probable responses; analysis and commentary on the questions.

Other useful information - background; difficulties with presentation, concepts, analysis, which are anticipated or have been found; particular theoretical bases, or analytical techniques, of use or significance; useful calculations; technical notes for students to study.

At the end - a model answer (there is disagreement over this, particularly as there may well in many cases be several appropriate answers, or none); the outcomes, or sequel, or what happened next; any final comments.

When to write the case note?

When should you write your training note? Thoughts on this vary; for example, Rotch notes that 'one experienced case writer has said that the time to write a case's outline is in the company car park as you leave.....if possible the outline should be started even earlier and the analysis should be outlined at the same time. That analysis forms the heart of the teaching notes that will continue to evolve as the case is completed and taught several times.'

Arguments for preparing the notes after the case discussion are given by Simmons, who claims that "the note could be prepared either before or after the case discussion. But to meaningfully provide helpful information it would be more useful to prepare the note after the event. The preparation of the note after the class discussion is advantageous on several grounds.

"In the first place, as the case and note are written from the viewpoint of the case writer, and hence to suit the writer's own pedagogical objectives, there may be other educational perspectives which may not be highlighted when the teaching note is prepared.

"Secondly, subjection of the case to classroom discussion has the tendency to reveal a range and variety of insights which, perhaps, the case writer would not have thought of and which, once included in the note, would be extremely beneficial to subsequent users of the case.

"Thirdly, and following from the second consideration, from the various perspectives resulting from classroom

discussion, the teacher would be in a better position to establish the areas of learning in which the case could be most effectively utilised.

"Fourthly, it provides the teacher with the opportunity to gauge the competence and capability of the participants in the learning session and thus determine what inclusions should be made in the teaching note."

Thus it is perhaps best to regard the preparation as a continuous process, which starts while the case is in preparation, and never really stops - training thoughts, perspectives, ideas and values change with time, with the result that some of the thoughts, suggestions and considerations which are in the note may become outdated or irrelevant. The contents of the note should never be regarded as being unchanging, nor as unchangeable or unchallengeable.

At all times, you as the facilitator involved with running a particular case must regard yourself as being at liberty to allow the class discussion to go in the directions which you think will be of most benefit to the participants. Don't restrict discussion to predetermined lines, merely because the way in which the case seems to be going is not in accordance with the training note, or because you seem to be moving towards a proposed solution to the case problem which is not among the possibilities which may have been mentioned in the note.

To repeat, then, the training note or teaching note is only a guide: you are the person running the case, and while the guide may be extremely helpful, don't let it control you and the way you operate.

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Those with reference numbers marked with an asterisk, e.g. 032*, have abstracts given in the 'Abstracts' part of this booklet.

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MORE DETAILED CONSIDERATIONS - SECTION 2

SPECIFIC WRITING PROBLEMS

The need for local cases

The most effective cases are those to which audiences relate most closely - with the likelihood that 'good' cases correlate well with the indigeneity of their content.

Case study applications may well not evolve until good cases are researched and written locally. Types of problems, legislation, culture, etc., tend to be very specific to particular regions, with the consequence that cases incorporating them are not readily transferrable to other countries or cultures.

Advocates of the case method in smaller countries experience greater difficulty in promoting cases as a medium for learning than their counterparts in larger nations where native case material is more readily available. Where cases have not been used, factors such as the format and style of the educational/training system may not be aligned to the possibility of using cases, by being knowledge acquisition oriented, or by there not being time in the centrally fixed curriculum for the necessary analysis.

Further difficulties arise because, though e.g. companies may be very willing to provide speakers for courses, they are often far more reluctant to have situations written down in case form.

So, the problem feeds on itself, and though new material is likely to be welcomed by the small group of trainers specialising in that particular aspect, the low demand in volume terms due to the small size of the market makes potential suppliers think twice before venturing into extensive casewriting commitments.

Most case producers write cases for use in their own organisations and so have definite objectives and target audiences in mind. In the absence of either a suitable indigenous case, or the time in which to write one, users

may be tempted to adopt a case which was created in another country, for another culture.

Most case writers are exposed at an early stage of their training to the comment by more experienced colleagues that the cases they write are not neutral. As a result of this requirement, they attempt at all times to avoid the inclusion of any opinions, impressions, prejudices and value judgements, unless specifically expressed by a person in the case. The ultimate goal which is held up as the ideal to all case writing beginners is the so-called 'neutral' case.

It might well be asked, though, how neutral are these cases? Because we try to be impartial, does that mean that we actually produce an impartial case? Can there ever be such a thing? Even if there is, does this necessarily mean that the learning of participants is any greater than it would be if no attempt was made to make the case neutral - or if it were even deliberately biased? It has never been clearly shown that case neutrality has any advantageous or disadvantageous effect on learning.

Any communication, in whatever area, is likely to be made from a particular viewpoint which has biases almost unconsciously included in it; these may be linguistic, but are just as likely to be gender or cultural biases - and with the last, particularly, being unlikely to be recognised and allowed for. There is a need to develop a recognition and an understanding of these biases, which are often built in as part of a case writer's upbringing and environment. Cultural assumptions, particularly, need to be specifically recognised, especially if a case is being used in a culture different from that for which it was written.

Gender neutrality

There has been an increasing awareness about gender bias in written materials over the past few years. This has led to a variety of attempts to get round it, some more successful than others.

The use of artificially constructed pronouns (s/he) or duplicated pronouns (her/his) creates rather clumsy writing effects, while notes inserted at the beginning may

either not be noticed, or may give offence:

"the male pronoun has been used throughout this work for stylistic reasons only: it includes both masculine and feminine genders."

or "when using pronouns, the male should be regarded as embracing the female, and vice versa."

Rather than using any of the above methods, it is probably preferable to rephrase sentences so as to get rid of any gender-specific examples. Instead of, for example,

"In role play, a player receives an outline of the role that he has agreed to assume and is then free to develop the characterisation of the role as he sees fit.....once he develops the characterisation of the role, he cannot change his 'character' while the game or role is in progress."

this can be rewritten so as to eliminate the gender references, e.g. as

".....a player receives an outline of the role that has been agreed will be assumed, and the characterisation of the role is then developed as the player sees fit. It is to be stressed, though, that once the characterisation of the role is developed, it cannot be changed while the game or role is in progress."

Similar ways can be found round most situations where a personal pronoun would once have been used; all that is needed is common sense and a willingness to try to rephrase.

Culturally specific cases

It is not always as easy to recognise any specifically cultural aspects in cases. Tixier and Berridge have identified four principal cultural constituents or areas as especially relevant to the use of the case method, each of which can have a considerable effect:

- a) imputed national characteristics;
- b) typical corporate values;
- c) prevailing economic systems;
- d) the values of the case writers and trainees themselves.

In general, they say, the more realistic a case is, the more difficult it is to adapt or transpose into another culture - its realism is often due to its cultural depth and specificity.

Cases are often translated into another language, and this can cause difficulties even if the language in which it was originally written is understood by those using the case. Despite any translational abilities linguistically, this is not often accompanied by any attempt to ensure an adequate cultural translation. The translation may even, because of this, be regarded as unhelpful by those who have a good command of the original language, and who may prefer to use the original version so as to get a better understanding of both linguistic and cultural aspects.

The way in which a case is constructed - structure, style, amount and format of information, etc. - affects both facilitator's and participant's responses to it. These, in turn, are affected by the educational culture in which it is written. Some educational cultures favour the maximum possible accuracy, order and structure in the so-called facts presented to the reader, so that the analysis then becomes a fairly mechanical process. The same case prepared in a different educational culture might well be very differently presented - with much less order, or even with disorder, and where the skills being fostered may be those of differentiation and creative interpretation of the material rather than dispassionate analysis.

Because of the different approaches to the solving of cases, dependent on the cultural value put on each method, the techniques of case writing may vary considerably. This cultural aspect of the writing stage, and its implications for that and for all subsequent stages, should be always borne in mind.

As was mentioned on p.32, the writers of cases typically are academics, administrators or functional experts in a company. The effect of this narrowness may be the production of cases which are somewhat stereotyped - serious, complex, high-minded, reflecting the culture and work ethic of the writer, rather than cross-cultural, or unethically, indelicate, or written in the much more racy language which tends to be used in everyday life. The lack

of variety instils in the trainees attitudes and approaches which reflect solely the educational, political and business system in which and for which they were written. A conscious effort needs to be made to overcome this limitation.

Even the balance of emphasis and perceived importance between case analysis and decision-making may vary considerably according to the value attached to decision making in different cultures; the mechanism of decision making will be different, according to the decision making structure employed, whether at the general level of structures of societies, or at the particular level of organisational configurations. The need for a solution to the case on the part of the students will vary; the preference for a type of solution can display cultural influences.

If there is a need to disguise names in a case, an item which gives no problems in e.g. European or U.S. cultures, difficulties can arise where tribe or caste plays a significant part in a culture. Instead of just changing site and names of company and workers, the cast list must have names appropriate to the area, and to the relative status.

Tixier and Berridge thus suggest that the substantial cultural content of both the case itself and of the case method argue for explicit treatment of culture as one of the essential components of the whole case process. They regard it as insufficient to treat culture implicitly or incidentally, but propose that cultural awareness should be fostered at the level of the case writer, the design of courses incorporating cases, and the classroom process.

The case writer needs to keep in mind that the case being created is in part a cultural document, with various facets of culture included both implicitly and explicitly. These could be questioned and analysed in the teaching note along with the technical aspects, and there may well be advantages in adding a cultural note, particularly if foreign students are likely to deal with the case.

Course design can include a range of cases illustrating cultural parameters, if only by a representative coverage of cultural variations. Group composition can also help,

by controlling it so as to aid the group members learning cultural awareness from each other and the group process reinforces the learning experience about culture.

Finally, the students can be encouraged always to include culture in their analysis schemes. In evaluating solutions, the teacher can customarily include the cultural dimensions as an essential element, on an equal footing with more conventional technical analyses.

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Those with reference numbers marked with an asterisk, e.g. 035*, have abstracts given in the 'Abstracts' part of this booklet.

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MORE DETAILED CONSIDERATIONS - SECTION 3

COPYRIGHT

Copyright is the name given to the principle that those who create works of the intellect should have a special relationship with them, in short that they should own them as property. If those who create or produce materials can control the use which society makes of them and can, by implication, make a charge for the value which is derived from them, they will be encouraged to produce more materials and so benefit, especially, education and the arts and sciences.

The U.K. in common with all developed countries which are large producers of published material, has a strong protectionist copyright law while those which produce little but use the products of others tend to have less restrictive legislation. You will need to be clear about the copyright situation in your own country, but it is unlikely to be more rigid than in the U.K. situation, which is taken as an illustration in the next paragraph.

In the U.K. there are eight categories of material protected:

-Literary works.

These include virtually anything in written form and include such things as street directories, business letters and private letters as well as literature in the commonly accepted sense. Also protected as literary works are computer programs.

-Dramatic works

These include plays and the written instructions for ballet or mime.

-Musical works

There is no definition, probably because of the difficulty of devising one.

-Artistic works

These include paintings, drawings, diagrams, charts, maps, engravings and photographs, all irrespective of artistic merit, along with works of architecture (buildings and models for buildings) and works of artistic craftsmanship, such as pieces of jewellery.

-Sound recordings

These include gramophone records and cassettes.

-Films

These include videos

-Broadcasts

This is opposed to, and in addition to, the material actually in the broadcast.

-Published editions

These are the typographical layouts which a publisher uses when setting a literary, dramatic or musical work, e.g. a new typographical layout of a work which may have been published many times previously.

There are many complicating factors in copyright law, and specialist information should be obtained if you are in any doubt.

By the very nature of many of their sources, cases will incorporate materials which have been published by others, and are thus protected by the laws of copyright. If you have also included interviews and other items obtained from organisations, you will need to get clearance to use these; though not necessarily all covered by copyright, this is advisable for both courtesy and to maintain good working relationships.

Copyright also applies to the case you produce. If it is written as part of your job as an employee, then the copyright normally belongs to your employer unless you have made an agreement to the contrary with your employer.

Despite this, if your case study includes materials which are the copyright of others, it is you as the author who has the responsibility for ensuring that copyright clearance has been obtained for those materials, regardless of who actually owns the copyright of your case study, or who might publish it.

Thus, any of the sources which were mentioned in the section on writing cases should be regarded as being in copyright, and permission should be sought if using more than a very small part of any. In addition, although a case may be based on published material, part or all of that material may have been obtained from unauthorised sources. In such a circumstance, the case writer should check the validity of the source, if possible; cross-check

the accuracy of the information, again if possible; and check that the material can be used.

Even where your entire case is based on fully authorized materials from an organisation, you should think several times about whether you should send a copy of the case to that organisation for correction of any errors, particularly if controversial issues are involved.

If you have collected information by means of discussions and interviews in an organisation, you should ensure that the situation with regard to this material is clear both to you and to the organisation. Before you start, indicate that some or all of the material may be used in a case study, subject to final approval by the organisation, and have it confirmed in writing that this is acceptable to the company.

When you have completed your case, submit it to the organisation in which you did the research for their written approval and confirmation of release. There may sometimes be problems - some material may be confidential; the organisation and/or particular individuals may not wish to be identified or identifiable in the case; aspects may be sub judice - but generally there are not problems with release. In fact, organisations are often sufficiently interested to send someone along to observe on, and maybe take part in, the use of the case.

Should your case be dealing with problems and problem areas which are very sensitive, you may suggest or it may be suggested to you that the identity of the organisation and of any individuals should be disguised. Doing this may affect the interest and involvement of the trainees because it is that much further removed from reality. Consequently, changing aspects such as the type of organisation, its location, the persons involved, the timing of the problem, should be done with considerable caution and care. However, if the request for disguise comes from the organisation, you as the case writer must honour that request.

Copyright laws apply as much to non-print material as to printed sources. Any photograph, slide, film, audiotape, videotape, or off-air recording will need clearance, and perhaps a copyright fee to be paid, before you can lawfully use it.

Failure to obtain copyright clearance and formal organisational release can result in, at the least, loss of cooperation from the organisation which provided the information (and probably from other organisations as well), or at the worst an expensive law suit for breach of copyright or the unauthorised publication of confidential information - or both!

To assist you in keeping within the law, sample letters are reproduced in a number of publications, e.g. those by the Case Clearing House of Great Britain and Ireland.

(The above information is based, with thanks, on that contained in the Council for Educational Technology Information Sheet No. 6).

SOURCE REFERENCES

Those with reference numbers marked with an asterisk, e.g. 038*, have abstracts given in the 'Abstracts' part of this booklet.

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D-The Effective Use of Cases

SECTION 1

SKILLS IN PRESENTATION

Preparing yourself

The main test for your new case will come when participants work through it and discuss it amongst themselves and with you. The most important question which must be answered is whether your case achieved the various objectives you had for it.

The answer to this will depend as much on the way in which you run the case, and the way participants approach it, as on the intrinsic virtues (or lack of them) that your case has. Some groups are inevitably better than others; they may relate better to the material, or to you as the facilitator, or to the use of cases as a more 'open' training method. Using case studies is certainly not an easy option, but their usefulness to participants is such as to make them an invaluable training or teaching method.

Because case studies can be in so many different forms in addition to the (so far) most common one of printed materials, there is no particular 'best' way of preparing for and using cases. Some suggestions as to factors you should consider are:

- (1) **Know your case!** While you are in the process of writing it, you will be familiar with it, but that intimate knowledge may fade a little between writing and presentation, and more particularly between successive presentations. Allow sufficient time for any special preparations which may need to be done.
- (2) **Check the teaching note** you have prepared, so that you are clear what your objectives are, and how you hope to achieve them. This can include how structured or unstructured the training session is going to be - you would probably be advised to keep it fairly well structured for your first case, and then relax the structure as you and your trainees become more accustomed to the technique - and how directive you are going to be. Again, you will probably feel more secure if you are in

control of the proceedings, but excessive control is often counterproductive. Once everyone is used to cases, the groups can probably become almost self-directing and self-controlling, minimizing their dependence on you.

Usually one of two methods is used. The Harvard case method uses an open class discussion; an alternative approach is to get individual trainees or groups of them to make verbal presentations of their analyses and conclusions, possibly followed by a plenary discussion.

(3) Following on from 2, the **size of the room** you are going to use, and the **type and layout of the furniture** in that room can be significant. As in most situations where discussion is going to form a major part of the process, a horseshoe-type formation will probably be the optimum arrangement.

(4) The **amount of time** you have available to you, and how that time is split up will have influenced your overall planning, and the balance between the amount of group work and of individual preparation and analysis that can be done. Time can affect whether the case is distributed for participants to read and to do some preparation before the first formal session, or whether they first encounter it in a formal session; whether all the case is presented at once, or in parts over a succession of sessions; the distribution of time between presentations, group discussions, plenary sessions; whether you make any input, and if so when; etc.

(5) The **number of participants** you have in the group; the minimum number is probably more significant than the maximum, in terms of the individual experiences and insights they can bring, and the amount of interaction that will take place. You will normally subdivide them into smaller groups of, say, 3-6 persons, and with several groups you will probably find the optimum number is between twenty and thirty.

There are no major difficulties with groups above this size, other than organization, and the cost of providing all with copies of the materials, but if the total number is half a dozen or less, they will probably need to operate individually. This will impose greater responsibilities on you to ensure that they all get the maximum benefit from the case (or some alternative

technique may need to be used), and the range of experience and insights that number will bring to a particular case will be limited.

As was said earlier, there is no one 'best' way of operating the case study method; a variety of ways can be effective in a variety of situations provided the main purpose is borne in mind - to help the participants to learn through interaction and participation.

Preparing your participants

The advantages to participants of using case studies in terms of the skills they develop have already been mentioned

analytical skills

application skills

creative skills

communication skills

social skills

self-analysis skills

though it is important in this regard to understand also what case teaching cannot accomplish. It is not a universal panacea.

To develop these skills to the best advantage, though, demands certain commitments from participants. It is as well to make clear right from the start what your expectations are of them, and also, and equally importantly, what they can expect of you.

The principal requirements of each participant are to:

- (a) **PREPARE.** Unless a participant reads the case and associated materials, analyses it, and then prepares some proposals as to one or a range of possible actions and solutions, any discussions will have little relevance.
- (b) **ATTEND,** for the entire session. Each of the participants needs to be present for the full length of each session so as to be able to contribute what has been prepared, to receive comments on it; and to be able to learn of others' thoughts and insights and to comment on those.

(c) **PARTICIPATE.** The entire process is dependent upon each participant giving to, as well as taking from, each session. Without full and regular participation - which is as much about listening to others as about making oral inputs - the development of knowledge and skills by participants will not be as great as might otherwise be the case.

Some participants will need more effort on your part to motivate them to prepare, to attend promptly and regularly, and to participate. Those who fail in these responsibilities can, if you do not guard against it, have a disruptive effect on the session and on the learning of the more conscientious attenders. It is up to you to maximise the motivation and minimise the disruption.

| Mettes & Gerritsma (1986) | Reynolds (1980) | Easton (1982) |
|---|---|--|
| Orientation | Analyse present situation | Understand situation |
| Planning | Predict future situation Choose objectives | Diagnose problem areas |
| Transformation | Define the problem Generate alternatives Predict outcomes | Generate alternatives Predict outcomes |
| Control Determine solution and evaluate it | Evaluate alternatives Choose alternatives | Evaluate alternatives Rounding out analysis |
| Interpretation | Implement decision | Communicate results |

Table 6: comparison of some suggested problem-solving formats for participants in case method.

Equally, you may need to exercise some control over those who contribute too much and tend to dominate a session. Often the group itself will provide some peer group control, but you may need to back this up by, for example, the allotment of time for discussion, the encouragement

and even calling on shy members to give their opinions, or not allowing anyone a second contribution until all who wish to do so have made a first comment or suggestion.

If participants are coming to cases for the first time, they will need to be provided with guidance on how to deal with them. Several authors have suggested a problem-solving format for students, and three of these are compared in Table 6 on the previous page.

Reynolds emphasises the implementation of the solution; Easton is concerned with the presentation of the solution to an audience; while Mettes and Gerritsma emphasise the progress review aspects (control phase) and a final reflection on the problem-solving strategy or on the learning effects (integration-phase).

Whichever method or combination of methods is to be used, your trainees will probably need some preparation and guidance on factors such as

-
- a. dealing with a considerable amount of (possibly conflicting) information;
 - b. deciding what the problems are, and which is the main one and which are subsidiary;
 - c. understanding how the problems arose - the what, when, where, who, how and why of the case;
 - d. devising and refining an answer or sets of alternative solutions to the problem, probably in groups;
 - e. predicting the possible effects of each of the proposed alternatives;
 - f. communicating the conclusions to others;
 - g. defending those conclusions;
 - h. listening to others' alternative conclusions;
 - j. reviewing the alternatives to feed back to and modify own conclusions if necessary;
 - k. making a final decision;
 - l. implementing that decision;
 - m. reflecting on the strategies taken to reach that decision;
 - n. considering the learning effects.
-

Avoiding problems

If the case method is introduced without preparing the participants for it, there are liable to be a number of problems come up. The types will vary with different groups, but some of the more common ones are

1. the amount of time that is needed for individual preparation for the case study discussion - working through the basic material, sorting out the essentials, etc. This will diminish with practice, but the positive effect of learning how to structure complex problems creatively should be emphasised.

2. that the plenary sessions are dominated by a small number of participants, while the remainder feel shut out. This can be controlled and corrected by you, but a reminder that making a contribution can be a competitive process in all walks of life might be useful. Suggest that no-one can make a second contribution until all who wish have made their first contribution; put a time limit on the length of an individual's single or total amount of contributions; if a group's work is being given, suggest that different parts are given by different members of that group.

3. the case leader doesn't control and guide the discussion sufficiently strongly, and doesn't give the answer to the problem. Promotion of the idea that the discussion is meant to be the central focus, that there is not necessarily a 'correct' recipe, and that a monologue from you is not the purpose of the discussion, may help. A directive facilitator may pose questions to be answered, specify methods, control discussion, delegate tasks to participants, while a non-directive facilitator will tend to ask open-ended questions, and any control will be concerned with the process rather than the content.

4. the material provided is insufficient for making a judgement on the case. Case studies reflect reality in reduced form: in practice, information is often incomplete and decisions must be made despite that. Alternatively, the information gaps may give participants an incentive to try to fill them e.g. by work in a library.

5. the case material is too long and too complex. This is within your control, and you should be able to

ensure a gradual build-up of complexity. The problems in the real world are not likely always to be simple, but you should give participants a chance to get used to the method, and to build up their expertise in stages.

6. that analysis and synthesis are skills of quite a high order, and **case studies may not always be an appropriate technique.** Always keep in mind the level of the participants, and your overall objectives with them; cases can usually be used at many levels, but they are only one of a wide range of methods you could use.

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THE EFFECTIVE USE OF CASES - SECTION 2

USING TECHNOLOGICAL AIDS

As has already been mentioned several times, cases need not necessarily be just paper and print based: you can have a variety of audio, audiovisual and computer-based materials which may contribute to your case anything from a small addition to almost the entire case. You may also have used similar techniques in preparing the case: your participants may use them in working through the case, and possibly in proposing their solutions.

In the section on writing the case it was suggested that audio or video recordings of interviews, (or of meetings or any event which might be of assistance in providing you with a good record of the information you need), might be useful in backing up, or in addition to, or as a substitute for your own written notes and your memory. These extra aids have the advantage that they can be played over and over again, and the material on them checked and rechecked, whereas for example with an unrecorded interview you have only your notes and your memory, and no real chance to check on these without re-interviewing.

Recordings can not only act as aids, they can also be included in the case materials, in part as additions to or complete as the main part of the case. For example, "Harvard Business School's videotapes supplement particular cases....These videotapes, which are mostly in colour, record actual meetings or other activities of managers engaged in work described in the cases. They also depict the conversations of top-level managers with the students in HBS classrooms. Used in conjunction with particular cases or course modules.....the videotapes add a dimension to the classroom experience that the printed word cannot convey."

Though the opportunity may not occur very often, there is sometimes the possibility of using a broadcast programme either as an adjunct to your case or as the main basis for the case. The broadcast may have been on public radio or television, so that you could take notes from it or, preferably, record it off-air either for analysis by

yourself or for your trainees to analyse. Care may need to be taken with regard to the completeness of the information - it will undoubtedly have been edited prior to transmission - but it can provide a valuable source. For this, and for many of the other items mentioned, make sure you have copyright clearance, though.

In composing the case it can be of great assistance to be able to make use of a word processor. The extensive use of, if not total dedication to, word-processing systems for assembling and updating of your case material can save time, can ease storage of your materials, and can be used to give a good quality printout of all the relevant materials when you want them. Don't forget to make backup disks of your stored data files, though.

On most occasions the printout from a word processor will be adequate for participants to use, but should there be a need for a higher quality output, computer typesetting can be used.

The preparation of other audiovisual components for your case can involve the use of e.g. photographic slide making; making overhead projector transparencies by hand, by reproduction on a suitable photocopying machine, or by (colour) graphics process on a computer; film; videosystems, either just using playback or interactive; computer programs; audio disc and video disc systems.

Cost and availability will often be the two criteria which will predominate in using any of these; the cost e.g. of mastering a compact audio disc with read-only memory (CD-ROM) or a similar videodic is at the moment too high to make either a viable proposition for putting your own case on. Both, though, may provide material on already existing ones which can be used by you. Interactive video systems - a television monitor, a video replay system, and some means of controlling what that system presents (a keypad; a typewriter-like keyboard; a computer; a touch sensitive screen) - represent an example of the very powerful types of training facility which could soon be in wide use.

Many cases now include some sort of computer program within them. The Harvard Business School case software, for example, is of three types:

- a **data matrix**. Simply a collection of data, which is used to build a model in a typically open-ended case, with

no single solution.

- a **model template** containing an analytical model and/or data from the case: for analyzing cases that describe a specific or classical model.

- **case application software** where the teaching purpose is to illustrate specific concepts.

Often, a required condition for entry to a U.S. college is the purchase of a personal computer of a specific type. Hopefully, this sort of condition will not spread: now that computer displays can be projected by means of an attachment on an overhead projector, rather than having to use a cumbersome and expensive video projection unit, small or large group use of one computer will suffice to allow the working through of the computer-based aspects of any case.

The implication is, though, that as the use of newer technologies increases, and as there is further integration or consolidation of case material with other training methodologies such as distance learning, games, role-play, you will need continually to upgrade your skills and become ever more versatile.

FURTHER READING ON TECHNOLOGICAL AIDS & INFORMATION TECHNOLOGY

Those with reference numbers marked with an asterisk, e.g. 044*, have abstracts given in the 'Abstracts' part of this booklet.

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- 579*UNESCO.(1985) Women in the Villages, Men in the Towns. UNESCO. H.M.S.O., London, England.
- 580 United Nations.(1983) Women and Development: Guidelines for Programme and Project Planning. H.M.S.O., London, England.
- 589 University of Natal (1985). Women in Southern Africa: a Bibliography.(1985) University of Natal.
- 581 Wei, K.T.(Ed).(1984) Women in China: a Selected and Annotated Bibliography. Greenwood Press, London, England.
- 582 Whyte, R.O. & Whyte, P.(1982) Women of Rural Asia. Westview Press, U.S.A.
- 583 Wiggans, R.(1985) Educational Aid: Women's Smaller Share. M.A. Thesis, University of London, England.

- 591*Women's Review Inc. Women's Review of Books. Monthly, except August. Women's Review Inc., Wellesely, Massachusetts, U.S.A.
- 592*The U.N. Decade for Women: an International Evaluation. (1985) Women's Studies International Forum, 8 (2).
- 593 World Health Organisation.(1985) Women, Health and Development.W.H.O. H.M.S.O., London, England.
- 594 Youssef,N.H.(1977) Women and Work in Developing Societies. Greenwood Press, London, England.
- 587*Zed Books.(1985). Women in Nigeria Today. Zed Books, London, England
- 604 Zewde,A.(1984). Role of Government in the Advancement of Women. ICPE, Ljubljana, Yugoslavia.

F-Abstracts

- 500 Adenkanye, T.O. **Women in agriculture in Nigeria; problems and policies for development.** Women's Studies International Forum

600 women were studied in 3 areas of Nigeria (west, east and north) so as to note the differences in their social and (agricultural) economic activities. The most important activities were care of children; housekeeping; and trading. The preferred activities, though, were less home-related, including more time on farming, processing and trading. They felt themselves left behind in the general drive towards development. The main policy implementation of the findings is that an employment-educational and incomes strategy needs to be devised for the women in order to enhance their contributions to agricultural and rural development in Nigeria and for their own personal fulfilment.

- 502 Afshar, H. (1984) **Moslem women and the burden of ideology.** Women's Studies International Forum 7 (4) 247.

The patriarchal nature of Islam has led to the total submission and exploitation of female workers, who though involved with production, have social contacts only in the home. This reduces the prospect of emancipation through competition in the labour market and makes them liable to be taken in by the idealised images of domesticity and motherhood that resurgent Islamic ideology presents.

- 503 Alam, S. (1985) **Women and poverty in Bangladesh.** Women's Studies International Forum, 8 (4) 361.

The phenomenon of female-headed households in Bangladesh is a new pattern. The author regards this not as increasing liberation, but as social abandonment of women - by husbands, and by male relations unable or unwilling to provide for women in contexts of family-based production. This growth of female-headed households is viewed in relation to commercialization of land; failure of industrial development; a critical decline in food availability; and the modernization of patriarchy. The author regards popular culture as now projecting women in overtly sexual terms, giving them a sexual role definition rather than as mother/sister/wife.

- 014 Argyris, C. (1980). **Some limitations of the case method: experiences in a management development program.** Academy of Management Review, 5 (2) p.293.

Argyris suggests that the case method as used in a management development program may (1) facilitate learning that does not question the underlying values of executives or the policies of their organizations and (2) inhibits the learning that would enable the executives to question these basic factors and to

improve the application of new learning in the home organization.

- 056 BACIE.(1980) Case Studies. British Association for Commercial and Industrial Education, London, England.

Over 100 short cases, written by members attending one of the Association's Techniques of Instruction courses, together with an introduction on the use of case studies as a training aid.

- 057 BACIE.(1980) Case Studies for Practical Training. British Association for Commercial and Industrial Education, London, England.

More case studies, with a matrix index to help identify the issues covered in each case. Can be photocopied by purchasers for training purposes.

- 044 Barker,P.(1986). Information technology, education and training. In, Rushby,N. & Howe,A.(Eds). Aspects of Educational Technology XIX: Educational Training and Information Technologies - Economics and Other Realities. Kogan Page, London, England.

This paper looks at the nature of information technology, which has been presented over the last few years as a powerful tool to help in the solution of many of modern society's problems, and discusses its potential for helping the implementation of teaching, learning and training processes. Particular attention is given to the concept of, and need for, intelligent teaching machines and/or workstations for educational use. The likely future role of information technology in the design and construction of CAL/CBT workstations is then discussed.

- 045 Bayard-White,C.(1985). Interactive Video Case Studies and Directory.National Interactive Video Centre/Council for Educational Technology, London, England.

This contains in-depth case studies of the use of interactive video for training in 5 British institutions, giving details of problems encountered and costs. The book concludes with a directory of discs available, and of projects working on interactive video. A useful introduction.

- 033 Berridge,J.(1987). The value of outcomes in the case method. In, interburn, N.R.(Ed) Proc. 3rd Int. Conf. on Case Method research and Application. Centre for Continuing Education, The City University, London, England.

Suggests that though case writers are urged to achieve accuracy and authenticity, the customary approach to management cases puts little emphasis on "what really happened". Berridge suggests that , without the outcome, the case does not represent the "whole truth". He critically appraises the value of the outcome, and its

role in teaching and learning strategies. The conclusions reached have applications in case research, authorship and use.

- 508 Bond-Stewart, K. (1984) Women's Problems. Zimbabwe Publishing House, Africa.

This book deals with problems such as education, food, housework, law, prices, unfaithfulness, by providing plays for women to act out, and so help women to identify and find solutions for their problems. These are backed up by further ideas and information for problem-solving, together with the addresses of useful organizations.

- 058 Boulton, W.R. (Ed). (Annual) Case Research Journal. Case Research Association, University of Georgia, U.S.A.

Provides a collection of case teaching materials each year, with no restrictions on the reproduction of materials from the Journal. Journals also usually contain one or two articles. Further cases are available, for a fee, from the Association; all are business-related.

- 511 Carr, M. (1984) Blacksmith, Baker, Roofing-sheet Maker... Employment for Rural Women in Developing Countries. Intermediate Technology Publications, London, England.

The author argues that traditional activities in which rural women have been engaged, such as handicrafts, can be unsatisfactory and insecure, generating low income for the workers. Using over 50 case studies, the book shows how less conventional businesses have developed the earning power of women, with evidence taken from 22 countries and covering 38 trades.

- 038 Case Clearing House. (-). A Note for Case Study Authors on Copyright and Permissions. The Case Clearing House of Great Britain and Ireland, Cranfield, England.

Includes a:

Sample request for permission to quote in part;
Sample courtesy letter;
Sample request for release of fieldwork-based case;
Sample release authorization.

- 089 Case Clearing House (-) Selected Notes on the Case Method of Teaching. (varied) The Case Clearing House of Great Britain and Ireland, Cranfield, England.

A collection of notes, of variable usefulness and mostly from Harvard Business School and directed towards the use of business cases. After an introductory section, there are papers grouped into teaching with cases; student approach to cases; case writing; and communications.

- 039 Council for Educational Technology. (1985) Copyright. Information Sheet No.6, Council for Educational Technology,

London, England.

A brief guide to copyright in the U.K., not intended to give more than an outline of the situation. Contains sections on basic copyright law; statutory relief for users; performer's protection; voluntary schemes; public performance.

- 046 Council for Educational Technology.(1985). CET Information Sheet No. 10: Videotex. Council for Educational Technology, London. England.

A short introduction to videotex, explaining the terminology and including sections on the various systems, costs and educational and training uses, with a useful bibliography for further reading.

- 047 Council for Educational Technology.(1986). CET Information Sheet No.11: an Introduction to Information Technology in Training and Education. Council for Educational Technology, London. England.

Extracts from this sheet have been used here, but it contains a useful annotated bibliography, guides to journals and abstracts, and a list of sources of advice, information and training on information technology.

- 040 Council for Educational Technology.() Guideline Two; Copyright Clearance, a Practical Guide. Council for Educational Technology, London, England.

A guide which will act as a day-to-day tool for those who have to consider any aspects of U.K. copyright law.

- 029 Davis,R.T.(1955) Some suggestions for writing a business case. In, Selected notes on the Case Method of Teaching. The Case Clearing House of Great Britain and Ireland, Cranfield, England,

A brief outline of the technique of writing a (business) case,including purpose, types,issues, facts needed, getting the facts on paper (i.e.starting the case; providing the background; introducing the significant facts; personal opinions of the casewriter; past or present tense; length of case; inclusion of statistics; the company's solution to the problem; proofing your case).

- 048 Dean,C. & Whitlock,Q.(1983). A Handbook of Computer Based Training.Kogan Page, London, England.

For managers, practitioners and academics involved in vocational and educational training, this book aims to be a comprehensive introduction to computer based training (CBT). The fundamental issues are discussed, as well as classroom examples. The book includes a guide to software, a glossary and a bibliography.

- 041 Dixit,M.R. & Jain,A.K.(1985) Experience with Case Method in Short Duration Executive Development Courses.

Working Paper No.579, Indian Institute of Management,Ahmedabad, India.

After considering the salient features of these short duration programmes, and the implications therein for the use of the case method, there is an analysis of the place and problems of class discussion, and a series of suggestions for making the case method an effective learning experience in short programmes.

- 003 Easton,G.(1982) LearningfromCase Studies. Prentice Hall International, Inc., London, England.

A book for the students who have to use and learn from cases. It shows how to analyse a case, evaluate the information, diagnose the problems, create possible solutions and choose the most suitable. Attention is also given to how to present the results in class, in reports and essays, and in examinations.

- 064 Evans,J.(1987) Case Study - the benefits of women-only courses.Transition, April, pp.16-17.

Describes a management development course at Ashridge Management College, England. It is aimed at senior women professionals who are already effective managers and have the potential to develop into leaders. The article outlines the reasons for the course, the reactions of some participants, and the contents of the course.

- 523 Gakuo,M.(1985) The Kenyan women and situation and strategies for improvement.Women's Studies International Forum 8 (4) 373.

This paper makes an observation of the Kenyan woman and her daily problems. It points out the responsibilities of women as mother, wife and worker in urban and rural situations. Aspects which have contributed to the current male-female situation are reviewed, and suggestions made as to ways in which Kenyan women can improve the situation.

- 524 Gardiner,J.(1976) ACase Study in SocialChange:Women in Society. Unit 32, Social Sciences ThirdLevelCourse D302,Patternsof Inequality.Open UniversityPress, Milton Keynes, England.

An examination of the position of women in Britain during the nineteenth century and some of the attempts to analyse it and change it. Four particular aspects are dealt with; what is the relationship between reform and revolution? What is the relationship between the social composition of a movement and its political perspectives? Is sex equality a meaningful, desirable aim? What is the relationship between capitalism and women's oppression?

- 049 Goodall,A.(1985). The Guide to Expert Systems. Learned Information, Abingdon, England.

This guide approaches expert systems from a practical point of view. It describes the type of work expert systems can do, and the resources needed to build them in terms of software, hardware and people.

- 528 Grieve, N. & Burns, A. (Eds). (1986) Australian Women: New Feminist Perspectives. Oxford University Press, New York, U.S.A.

A collection of essays dealing with the present and recent status of Australian women, with particular emphasis on their position in the political, sexual, work and family areas.

- 050 Hawkrige, D. (1983). New Information Technology in Education. Croom Helm, London, England.

A survey of recent developments in information technology which aims to show how it can be used to improve the quality of education. Included are sections on IT in primary and secondary schools, teacher training, vocational and continuing education. Social, economic and technical problems are also considered.

- 051 Heaford, J.M. (1984). Myth of the Learning Machine. Sigma Technical Press; John Wiley and Sons, Chichester, England.

A two part discussion of computer based training, the first concerned to analyse relevant research and experience and the second to give practical advice on creating computer based training resources.

- 052 Health and Safety Executive. (1983). Visual Display Units. Her Majesty's Stationary Office, London, England.

This contains guidance and recommendations about the introduction of visual displays as they relate to the health and well-being of their users. The first part is concerned with possible health effects of VDUs and the second aims to provide general guidance on human factors in the introduction and operation of VDUs.

- 068 Holter, H. (1985) Cooperation and conflict - a case study of a women's research forum network in Norway. Women's Studies International Forum, 8 (1) 37.

Describes the organization of an association formed to study women's mutual relations in various settings. The purpose, structure, positive results, and some of the types of conflict that developed in this association, and how the latter were avoided, are discussed, and the question asked as to whether deliberate conflict avoidance is functional for a feminist network or organization.

- 532 Inamdar, H.V. (1984) Separate University for Women. The Progress of Education, 59 (5) 90-94.

A brief history of the S.N.D.T. Women's University,

India, together with outlines of the current situation of courses there and likely future developments.

- 269 International Centre for Public Enterprises in Developing Countries (1982). Interregional Seminar for the Implementation of Training of Management for Industrial Public Enterprises in Developing Countries, 1982, Ljubljana. ICPE, Ljubljana, Yugoslavia.

Some of the papers are of use, principally those which describe training and training courses in e.g. nepal, Guyana and the Philippines. There is also information on the training of trainers.

- 595 International Centre for Public Enterprises in Developing Countries (1983). International Expert Group Meeting on the Possibilities for the Advancement of Women through the Operation of Public Enterprises in Developing Countries, 1983, Colombo, Sri Lanka. ICPE, Ljubljana, Yugoslavia.

Includes an issue paper by the ILO on working women and public enterprises; the position of women in India, in Nigeria; women as decision makers in Sri Lanka; and the roles and responsibilities of public enterprises for the advancement of women.

- 268 International Centre for Public Enterprises (1984). Expert Group Meeting on Research in Public Enterprise Management Training in Developing Countries, 1984, Kuala Lumpur, Malaysia. IPCE, Ljubljana, Yugoslavia.

Contains a variety of papers on management training, principally on the assessment of training needs in organizations such as public airlines, national banks and electricity corporations, but also including evaluations of effectiveness together with a selective bibliography on management training in the public sector. Several of the papers are case studies.

- 311 International Labour Office (1980). Women in Rural Development - Critical Issues. International Labour Office, Geneva, Switzerland.

Considers the problems of disadvantaged rural women, specifically the effects of different agrarian structures, of market intrusion on rural women's work, the form of the household economy in agricultural societies, self-management, and the role of women's organizations. Critical areas for research and action are suggested.

- 313 International Labour Office (1985). Women Workers in Multinational Enterprises in Developing Countries. International Labour Office, Geneva, Switzerland.

A comparison of women workers employed by multinational companies in 30 different companies, covering factors such as wages, hours and working conditions; fringe benefits; labour relations; and quality of life. An evaluation is made of the effects this employment

has on women's roles, their position in society, and on national development.

- 586 ISIS (1984). Women in Development: a resource guide for organization and action. ISIS Women's International Information and Communication Service. New Society Publishers, Philadelphia, U.S.A.

Gives a systematic exploration of the relationship between women and multinationals, rural development, health, education, and migration, and what women, in both developing and developed nations, are doing to change the conditions of their lives. Consists of overview articles, each ending with selected sources and comments on the usefulness of these sources.

- 534 Jahan, R. (Ed). (1980) Women in Asia. Minority Rights Group, London, England.

This report focuses on nine Asian countries - Pakistan, India, Sri Lanka, Bangladesh, Philippines, Indonesia, Korea, Japan and China - and reports on the wide disparity in life styles and opportunity structures for different groups of Asian women, based on differences of socio-political systems, ethnicity, religion, culture, class and urbanization.

- 021 Juch, B. (1983) Personal Development: Theory and Practice in Management Training. John Wiley and Sons, Chichester, England.

A guide to personal development for management education and training. Learning and development models are considered, and the author develops a Personal Inventory Exercise which he suggests is more readily applicable than the well-known Kolb Learning Style Inventory. Gives a useful overview of learning theory as seen from the trainer's point of view.

- 074 Kilcourse, T. (1981) Writing case studies. BACIE Journal, Jul/Aug, pp.23-25.

An article written as a result of finding a lack of information on the skills of writing cases. Aspects considered include defining objectives; developing skill or knowledge; assumptions and attitudes of the target group; sources of data; quantity and form; design options.

- 010 Kralj, J. (1985) The live case method for teaching, consulting and research in business studies and management. In, Winterburn, N.R. (Ed). Proc. 3rd Int. Conf. on Case Method Research and Application. Centre for Continuing Education, The City University, London, England.

The author finds that conventional case studies of the orthodox Harvard style do not entirely satisfy his needs in education and training for business studies and management. Live case methods are used instead, and the

author has developed specific live cases to attack actual organizational policy and/or functional problems, using also role playing and brainstorming. Spinoffs are that the suggestions of participants are often put into practice by industrial organizations, they provide a valuable research base, and also allow the writing of conventional cases.

- 539 Leghorn, L. & Parker, K. Women's Worth: Sexual Economics and the World of Women. Routledge and Kegan Paul, Boston, Massachusetts, U.S.A. 1981.

Using the premise that Patriarchal economic systems are founded on women's unpaid labour, the authors investigate the economic basis of women's culture across cultures. They postulate that women's oppression is so deeply institutionalized worldwide that it is firmly entrenched in all social, political and religious systems; examples are quoted.

- 035 Liljamo, R. (1987). Barriers to the use of the case method. In, Winterburn, N.R. (Ed). Proc. 4th Int. Conf. on Case Method Research and Application. Centre for Continuing Education, The City University, London, England.

Case writing and use in Finland started in the 1960s, but there is still a lot of resistance to them. It is suggested that major barriers are the Finnish culture and educational tradition, particularly the latter - authoritarian, with rigid timetabling, isolation, and little university teacher training. Also, there is a great need for indigenous cases because of the differences in e.g. size, types of problems, legislation, culture, etc., which make American or British cases difficult to use.

- 535 Manso, A.J. (1986) Some social and demographic characteristics of Southeast Asian refugee women in the U.S. Paper to the 83rd Annual Meeting of the Southern Rural Sociology Association, Florida, Feb.

There are over 700,000 refugees from Southeast Asia in the U.S., 44% of them women. Many were competent professionally or as entrepreneurs before leaving Asia - the women of Southeast Asia have a relatively high social status compared with women in other Asian countries. However, they are stereotyped in the U.S. as poor and uneducated refugees.

- 107 McClintock, C. (1985) Process sampling - a method for case study research on administrative behaviour. Educational Administration Quarterly, 21 (3) 205-222.

This review of how to sample in case study research has three main purposes:

1. to highlight the conceptual importance of defining processes;
2. to identify the methodological advantages;
3. to suggest that information management is an

important aspect of the administrator's job of affecting performance.

The case cluster technique is claimed to offer a way to structure case study research so that data collection, analysis and reporting can be done in a more focused way.

- 077 McGraw-Hill. (-) Guidelines for Bias Free Publishing. McGraw-Hill, New York, U.S.A.

This book has been written for the authors and staff of McGraw-Hill, but any author, whether of books, or of cases or other learning materials, will find this short book of use. The book starts from where implicit bias has been recognised, e.g. the use of 'he' when including both masculine and feminine genders, and aims to give practical advice and guidance on equal treatment of the sexes, fair representation of minority groups, and fair representation of disabled people.

- 053 Meadows, A.J. et al. (1985). Dictionary of and Information Technology. Kogan Page, London, England.

This is aimed at both non-specialists and those with an interest in the area of IT, and at those in various specialist groups whose concerns overlap into the field of new IT. The dictionary contains over 2500 entries and is intended to cover all the major areas of IT.

- 585 Methuen (1985). Women: a World Report. Methuen London Ltd., England.

The report is on the lives of women throughout the world at the end of the United Nations' Decade for Women. In three parts, the first reviews the information assembled by the United Nations at the Decade's end; the second uses essays to focus, in varying degrees of detail or usefulness, on either work, family, education, politics, or sex, in ten different countries; and Part 3 gives major statistics in clear tabular form about women around the world.

- 548 Nelson, N. (Ed). (1981) African Women in the Development Process. Frank Cass, London, England.

Examines the role of the African woman within the rapid change which is taking place in Africa, and the effect of these changes on their lives, economic productivity, autonomy, and relationships with men of their households and of their communities. Consideration is given to the development process; the perceptions women have of development; the ways development has given rise to unequal opportunities; work and the household; and the key roles that women play in economics and in societies.

- 584 New Internationalist (1986). With These Hands. Video, 33 minutes. New Internationalist, Oxford, England.

An account of women's role in African agriculture, comparing three different countries (Kenya, Zimbabwe,

Burkina Faso), illustrating the clash which occurs between corporate power and village democracy, and the conflict between traditional male authority and newly organized women.

- 036 O Cinneide, B. (1984). **Case method problems in smaller countries: a case writer's view..** In, Winterburn, N.R. (Ed). Proc. 4th Int. Conf. on Case Method Research and Application. The City University, London, England.

The author claims that effective cases are those to which audiences relate most closely, but that there is a scarcity of real-life indigenous cases in smaller countries. Despite that, the low demand makes any suppliers reluctant to research and develop them, especially when coupled with the difficulty of getting them published commercially. The writer is optimistic, though, provided an appropriate business/marketing strategy is adopted, and he details his approach to the research/development/propagation problem.

- 555 Pala, A., Awori, T. & Krystal, A. (Eds). (1983) The Participation of Women in Kenya Society. Kenya Literature Bureau, Nairobi, Kenya.

A book based on a conference in Nairobi in 1975, held to examine the available data and the research needs regarding women's participation in society. Major sections are on women in rural development; women and the legal system; education and training of women; and the image of the African woman in society. There are other background papers, and a considerable amount of detail is obtainable.

- 054 Parsloe, E. (Ed). (1983). Interactive Video. Sigma Technical Press; John Wiley and Sons, Chichester, England.

Intended for interested first-time users, amateurs and professionals, this book is a good introduction to interactive video. Sections include: applications - the way in which interactive video is already being applied in both education and training; video technology, computer technology, key concepts and equipment.

- 037 Peppas, S.C. & Peppas, S.R. (1987). **Quantitative methods and approaches used in analyzing case studies: an examination of cultural differences.** In, Winterburn, N.R. (Ed). Proc. 4th Int. Conf. on Case Method Research and Application. Centre for Continuing Education, The City University, London.

In response to a concern about American students' lack of mathematical skills and ability to analyze problem situations competently, this initial study was done to see whether American students differ from students in other parts of the world in terms of their approaches to solving problems and their use of, or preference for, quantitative analysis. The authors found no significant relationship between either of the above and

geographical/cultural background.

- 009 Reynolds, J.I. (1980) Case Method in Management Development. International Labour Office, Geneva, Switzerland.

A practical guide aimed to help with the more effective use of the case method in the total process of developing managerial skills. In four sections, aimed at different audiences, Part 1 has the intention of helping participants study by means of cases; Part 2 is for teachers and trainers wanting to use the method; Part 3 is for those wishing to write cases; and Part 4 for institution heads and training directors who wish to promote the use of the method in their institutions and organisations.

- 557 Robertson, C. & Berger, I. (1986) Women and Class in Africa. Africana Publications, London, England.

A collection of 13 essays on 9 countries in west, central, eastern and southern Africa. These essays explore women's experiences in class formation, class consciousness, dependence/autonomy, and access to resources. In all of the geographical regions, the women are mainly in farming, are mainly unwaged, providing a resource which subsidizes male labour and ensures the reproduction of the labour force.

- 042 Roebuck, K. (1986) Notes on a practical approach to the objectives and strategies of teaching by the case study method, in particular for teachers of management in colleges of further and higher education. In, Selected Notes on the Case Method of Teaching. The Case Clearing House of Great Britain and Ireland, Cranfield, England.

A guide which was written for teachers new to the case method, biased to account for the conditions most likely to be found in colleges of further and higher education. Includes sections on how the instructor prepares, and on teaching style and classroom strategies.

- 088 Rosenthal, N. et al. (1985) Social movements and network analysis - a case study of nineteenth century women's reform in New York State. American Journal of Sociology, 90 (5) 1022-1054.

Examines the organizational affiliations of nineteenth century women reform leaders in New York State as a case study of relations among social movements. Women's organizing efforts show three distinct periods of activity between 1840 and 1914, with significant changes in the relations among organizations from period to period.

- 034 Rotch, W. (1985). Case teaching notes. In, Winterburn, N.R. (Ed): Proceedings Third International Conference on Case Method Research and Application. Centre for Continuing Education, The City University, London, England.

Rotch emphasises the importance to the case of the teaching note, an item to which he feels too little attention is paid. In developing his thesis, he outlines purposes of teaching notes and their possible range of contents: he then gives several brief examples of notes from cases and the purposes they serve in each case.

- 424 Sculli, D. (1984) Using business games in engineering education. Engineering Education 75 (3) 159-161.

Arguments for the use of business games in engineering courses are presented. It is suggested that they can teach some of the quantitative techniques of decision making and demonstrate their significance in practice.

- 561 Seager, J. & Olsen, O. (1986) Women in the World: an International Atlas. Simon and Schuster, New York, U.S.A.

The authors use both normal statistical sources plus newspapers and journals to create an atlas in which maps are grouped into subjects - marriage, motherhood, work, resources, welfare authority, body politics, change and statistical politics. Each map has a limited amount of analysis and discussion, together with references. The maps give a visually effective display, but some of the sources used, and the brief amount of discussion, means that some of the information is less balanced than others.

- 030 Simmons, C.M. (1981) The Case Method: A Guide for Caribbean Trainers. Caribbean Centre for Development Administration, Garrison, Barbados.

A guide prepared by CARICAD for public sector managers and trainers in the Commonwealth Caribbean who are interested in the writing of cases and the use of the case method, but have had no experience. Basic aspects of case methodology are examined, including: the case concept and types of cases; the case method and its use; preparing the case; case presentation.

- 093 Spanier, B. (1984) Inside an integration project: a case study of the relationship between balancing the curriculum and women's studies. Women's Studies International Forum, 7 (3) 153-159

Presents a view by the project director of a federally funded integration project in a small eastern U.S. women's college. Various stages and kinds of women's studies are given as examples, and distinctions made between superficial integration and more profound effects which lead to a struggle between traditional and feminist scholarship.

- 026 Stuhler, E.A. (1984/5/7). (Papers in Volumes 2, 3 and 4 of) Winterburn, N.R. (Ed). Proceedings of The International Conference on Case Method Research and Application. Centre for Continuing Education, The City University, London, England.

Stuhler gives considerable detail about a long and wide-ranging experiment done to determine the comparative merits of the case method and of lecturing. The experiment lasted for several years and included several German universities and the University of the Philippines. Motivation, interaction, learning experience, and achievement were evaluated, together with adaptation difficulties of organizations, faculties, and students.

- 568 Tellis-Nayak, J.B. & Costa-Pinto, S. (1979) Towards Self-reliance: Income Generation for Women. Divine Word Publications, Indore, India.

A practical book intended for women workers at subsistence level which aims to improve self-reliance and development of the target group, not only through generating income but also hopefully through moving into business. Consisting of text, case studies and a list of resource agencies, the book includes: context of income generation, planning income generating programmes, change with and through people and the small entrepreneur. Though written for India, it may be a useful exemplar.

- 013 Tixier, M. & Berridge, J. (1985) Cultural transfer in case study usage. In, Winterburn, N.R. (Ed). Proc. 3rd Int. Conf. on Case Method Research and Application. Centre for Continuing Education, The City University, London, England.

A useful critical discussion of the potential of the business case for 'cultural neutrality', together with a detailed examination of certain key components of business-related culture. The influence of culture on the case method is traced through the sequence of identification of case material and authorship up to the teaching/learning processes in the classroom context. The concept of cultural awareness is developed, and suggestions made as to how this may be operationalized both intellectually and in terms of managerial skills as part of the case method in business education.

- 571 UNESCO. (1983) Bibliographic Guide to Studies on the Status of Women: Development and Population Trends. Bowker/UNIPUB/UNESCO Paris, France.

A useful and comprehensive documentation of works dealing with women in Africa; the Arab region; Asia; Eastern Europe; Latin America; and the U.K., U.S.A. and Western Europe. After a general introduction quoting sources dealing with labour force participation, and women's role in economic development, the major part of the bibliography is devoted to research on the status of women, development, and population trends.

- 573 UNESCO. (1984) Social Science Research and Women in the Arab World. Frances Pinter, London/UNESCO Paris, France.

The book presents studies on Algeria, Egypt, Iraq, Libyan Arab Jamahiriya, Morocco, Saudi Arabia, Tunisia and Sudan, which describe the situation of women and research in the respective countries, and how future research could be rendered more relevant to their concerns and to the needs of other women in the region. Contains useful references and select bibliography.

- 579 UNESCO.(1985) Women in the Villages, Men in the Towns. UNESCO. H.M.S.O., London,England.

A study encompassing 5 countries - Bangladesh, India, Republic of Korea, Philippines, Thailand - of the changes which take place in rural areas, and to the women left behind when men leave and go to the cities to supplement family incomes. Consideration is given to changes in the social organization of the family, and its authority, structure and economy; and to the effect on the village community, and the participation of women in the social and political life of that community.

- 270 United Nations Industrial Development Organization /International Centre for Public Enterprises in Developing Countries (1984). Training Programme for Industrial Public Enterprise Management Trainers, 1984, Ljubljana. IPCE, Ljubljana, Yugoslavia.

Deals with training needs assessment, curriculum development, and training practice in e.g. Ghana, Mauritius, Jamaica, Malaysia, Nepal, Uganda. Also includes a bibliography, a guide to the development and use of instructional technologies and learning aids, and the use of case studies in developing countries.

- 027 van Woerden,W.M. & Lelieveldt,S.(1987) Two formats concerning the case method, for students and for teachers. In, Winterburn,N.R.(Ed). Proc. 4th Int. Conf. on Case Method Research and Application. Centre for Continuing Education, The City University, London, England.

This paper presents preliminary findings on an educationally-based approach to the case method. To teach students how to solve problems, both this process and the teaching-learning process must be taken into account, and this is being done by the authors in producing two preliminary formats. The format for teachers is presented in outline; this ensures that all the tasks necessary to ensure the best learning are considered when writing a case.

- 098 Weinshall,E. & Raveh,Y-A.(1983) Managing Growing Organizations - A New Approach. John Wiley and Sons, London, England.

The role of the case method in training executives and in management education, as well as in cross-cultural behavior, is discussed in different parts of the book.

- 101 Winterburn, N.R. (Ed). (1984) Proc. 2nd International Conference on Case Method Research and Application: April 1984, The City University, London. Centre for Continuing Education, The City University, London, England.

A conference held every 18 months for practitioners and theoreticians of the case method of instruction. Of particular relevance in this volume are; some preliminary results on comparing the case method with lecturing as a system of instruction; case writers' problems in smaller countries; and difficulties that can ensue when using cases translated from another language.

- 102 Winterburn, N.R. (Ed). (1985) Proc. 3rd International Conference on Case Method Research and Application: September 1985, The City University, London. Centre for Continuing Education, The City University, London, England.

As for the Second Conference. Contains papers on - further analysis of a comparative teaching experiment; case teaching notes; cultural transfer in case study usage; the live case method; Indian experiences with running cases on both short duration and long duration courses; and others.

- 103 Winterburn, N.R. (Ed). (1987) Proc. 4th International Conference on Case Method Research and Application: April 1987, The City University, London. Centre for Continuing Education, The City University, London.

Contains a further selection of papers on case method, of which those of particular relevance are referred to under each author's name (Berridge, Liljamo, Peppas, Stuhler, van Woerden), but other papers are of interest in a general or a particular way.

- 591 Women's Review of Books. Women's Review Inc., Wellesley, Massachusetts, U.S.A.

A monthly listing of books by and about women and women's studies, together with long and useful reviews of some books.

- 592 Women's Studies International Forum. (1985) The U.N. Decade for Women: an International Evaluation. 8 (2).

The entire issue is devoted to considerations of the position of women in various parts of the world, and the impact of the Women's Decade. Also included is a report from the coordinator of the International Conference on Research and Teaching Related to Women.

- 587 Zed Books (1985). Women in Nigeria Today. Zed Books, London, England.

Papers from a seminar at Ahmadu Bello University, Zaria, Northern Nigeria, in 1982 on the nature of women's oppression. It contains a few good and interesting case

studies, but many of the papers are general and repetitive.

055 Zorkozy, P.(1984). Information Technology: an Introduction. (2nd.Ed). Pitman, London, England.

An informative and well-organised introduction to a wide range of systems. Section 1 explains the main areas of application and Section 2 gives the technical background, well explained and supported by line drawings. Chapter headings include telecommunication, optical systems, video, computers and computer vision, data protection, expert systems, microforms, voice communication, data networks, electronic mail and videotex.

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Zentrale für Fallstudien e.V.,
Schloss Gracht,
5042 Erfstadt 1.

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Printed and published by
The Commonwealth Secretariat

May be purchased from
Commonwealth Secretariat Publications
Marlborough House
London SW1Y 5HX

ISBN 0 85092 250 X

