Case Writing Guide

Case writing is a process that begins with the decision to use a case and ends with the use of the case in class. The entire sequence of steps in the process can be found in Figure 1. The suggested activities for case writing contained in this guide are meant to assist faculty in organizing and presenting information in the case format. The focus is on the writing process.
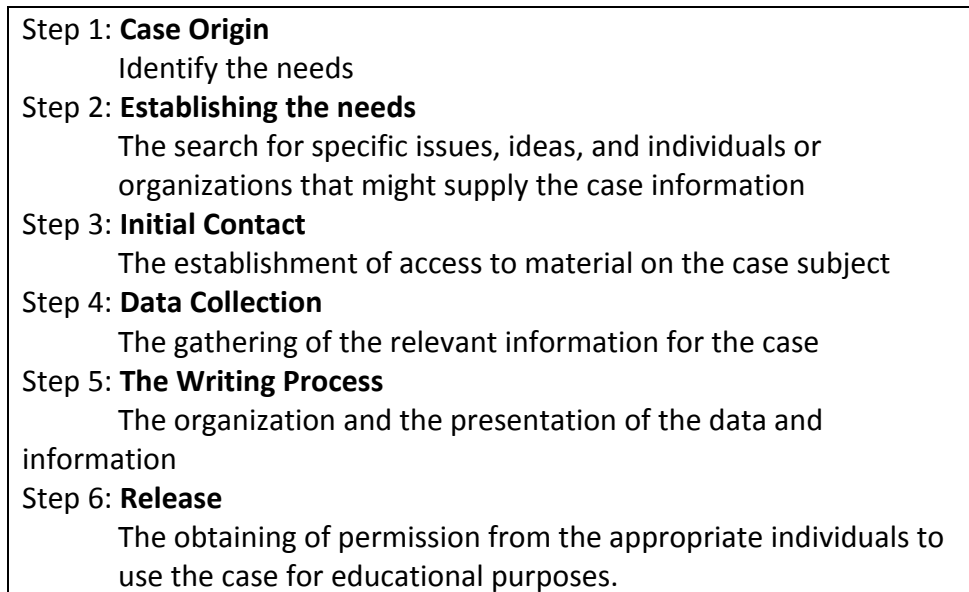
> Step 1: **Case Origin**
> Identify the needs
> Step 2: **Establishing the needs**
> The search for specific issues, ideas, and individuals or organizations that might supply the case information
> Step 3: **Initial Contact**
> The establishment of access to material on the case subject
> Step 4: **Data Collection**
> The gathering of the relevant information for the case
> Step 5: **The Writing Process**
> The organization and the presentation of the data and information
> Step 6: **Release**
> The obtaining of permission from the appropriate individuals to use the case for educational purposes.

Figure 1: The Case Writing Process Adopted from Leenders & Erskine (1989)

Types of Cases
Before considering the specific activities involved in the writing process, you should be aware of some basic information concerning cases. Usually cases describe particular situations in which people are engaged in complex issues and are forced to take actions on a dilemma. Cases are often used in problem-based learning, in which students are placed in a problem situation and are encouraged to take the role of problem solvers. In this instance, cases are action provoking - designed to present a problem that places students to be in the shoes of a relevant decision - maker in that particular situation for analysis and action recommendations.

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

Value of Cases

Cases put students in an active learning mode. In other words, cases invite students to do specific tasks and to think about the things they are doing. In essence, cases present students with opportunities to analyze and solve relevant real-world practical problems. Cases challenge students to test what they learn through practice instead of merely testing their memory. Thus, cases are useful in instruction that involves high-order thinking such as problem solving and interpretation. Moreover, cases promote transfer. Active learning and engagement in solving problems causes students to better apply what they learn to similar problem situations in the real world.

Activities in the Writing Process

Writing cases is a challenging task, but the learning outcomes that stem from their use can be rewarding. Case writing involves complex and reflective endeavors as well as the opportunity for creative expression. A case writer has to analyze, evaluate, interpret, and synthesize information and ideas. In fact, writing cases can enrich one's teaching and research. The writing process comprises four major activities: planning, organizing, drafting, and revising.

Planning

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

(1) Identifying the purpose of the case writing task: In an educational setting, the function of the case is instructional. Therefore, the questions to consider when writing pertain to what your students are supposed to learn with the case (learning outcomes) and what context the case is to be used in the course.

- What are the learning outcomes for the case?
  Learning outcomes specify what students are expected to know and what they are expected to be able to do, value, or feel at the completion of an instructional segment (Nitko, 1996). That is to say, you have to think about or list the learning issues you would like students to engage in while studying the case, and the learning outcomes that students should reach after completing work on the case. Eventually, the learning outcomes help you determine the content of the case in terms of the concepts, rules and principles needed.

- How is the case used in terms of the instructional sequence?
  a. A case can be presented at the beginning of the instruction to elicit students' attention. The problem scenario presented in the case functions as a stimulus to motivate students to engage learning.
  b. A case can also act as an anchor that supports the learning of the content or skills of the subject. For example, some New Pathway courses in Harvard Medical School

plan cases and other exercises around a weekly theme that integrates bioscience and clinical learning issues.

c. You can ask students to read and analyze the case before coming to class. As a result, lectures and discussions in class can revolve around the concepts, rules and principles that are embedded in the problem situation.

d. Another way is to present the case in class and employ a role-play activity to involve students in the problem solving process.

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

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

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

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

- How much do students know about the subject?
  An effective case should make students interested in and motivate them to acquire a deeper understanding of the concepts and rules that have been taught or they are going to learn. Awareness of the level of entry skills of students is helpful in determining what learning issues should be pursued in the case and in detecting the differences between the learning outcomes and the prior knowledge students have of the subject matter. The differences help you decide what information is necessary to include in the case and what other teaching materials should be supplemented so that students can empower themselves as problem solvers. Finally, the academic background of students helps to determine the tone of the case. Word-choice and the extent of explanatory detail contribute to the quality and character of this tone.

- What are the functions of students in the case study?
  Usually students in a case study implicitly assume the roles of the decision-makers in the case. However, a case developed for role-playing is presented somewhat differently from the one designed to provoke discussions among students. While both have rich descriptions of the problem issues in the case and enable the discovery of concepts,

principles or rules to be learned, a case involving role-playing may require the case writer to embed more detailed information. Information such as the positions and the perceptions of the people involved, are essential in helping students make inferences during their decision making. Sometimes, the case writer also needs to provide other external resources for students to use in order to work out the issue or problem they confront. On the other hand, a case for discussion may present straightforward and comprehensive information about the context in which the problem arises, the chosen solution, and its consequences.

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

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

which is more open-ended and controversial, and therefore brings out diverse opinions and multiple solutions.

(1) Structuring in a narrative style: Cases resemble lifelike stories and contain more description and detail than simple presentations of concepts, rules and principles. Thus, students are more motivated to get involved in the situation and its resolution. Cases, situated in a problem context, are also more easily recalled by students and transferred to a new problem situation. All of these reasons make the use of cases effective in instruction.

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

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

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

- How should the case reveal multifaceted phases of a problem?
  A plot should be implemented in the case. The plot should revolve around an interest or conflict-arousing issue. The plot should provide uncertainty and draw students into the particulars of the subject matter related to the case and the roles of the actors involved in the case. For example, a case dealing with the welfare policy may well raise controversy about the positive and negative impacts of new welfare legislation.

- How does the case show different perspectives?
  A case writer should reveal the information in a way that the discussion of the case or the suggested solution for the case will draw students into contention of different interpretations, different judgments, different decisions and, consequently, different

actions to take. The best way to enhance such effects is to display contrast and comparisons of different opinions by using direct quotations and dialogues.

Drafting

Drafting is putting your ideas and thoughts down on the paper. The activity transforms ideas into concrete words and sentences; however, the focus of the activity lies in developing the ideas rather than on spelling, grammar, or paragraphing. When you start to write, you should know how the case is used in the instruction and what students are going to learn out of the case. In other words, you have to make sure your writing is congruent with the learning issues that organize the study of the case. In this stage, an outline of the case is shaped. After the activities of planning and organizing the case, a case writer should have ideas about what to write about in the case and how to present those ideas in the case. Moreover, materials and information for developing the case should also be at hand. Drafting forces the writer to further develop the ideas and digest the materials and information that were gathered from personal experiences, the interviews, documents, or other sources.

- What is the central idea of the case?
  The central idea of the case emerges during the planning activity of the writing process. It is the controlling idea that provides the focus of the case. In fact, it derives from the learning outcomes   what the students should know and do. The attention of the case should focus on the learning issues that you want students to explore.
- How should the central idea of the case be supported?
  The case is a means of learning and presents a description of a problem or decision situation where the learning issues are embedded. Thus, the development of the case evolves in such a way so that the description will lead students to explore the learning issues and engage them in finding and solving problems. The key in developing a case is to give sufficient information to help students situate themselves in the case. While you are writing, you will be deciding what students need to know to understand the case. For example, in the study of international policies, if you want to support a learning issue about establishing diplomatic relationship between two countries, you should present the facts, explanations and evidences about the current relationship between these two countries and why there is a need to establish the relationship. In the study of lightening design, you may want to give the descriptions of the size of the room, the function of the room, and how the electrical outlets are laid out in the room. All of this information helps support the development of the case.

Revising

Revising involves re-reading, evaluating, and making changes to improve the written case. While re-reading, you have to be an objective, critical reader. While evaluating, you need to know what to look for in your case, i.e., you have to identify major case components and judge them with a set of principles or criteria. Sometimes, it helps to have someone else review your case in order to provide an objective evaluation. Whether you are self reviewing or having

someone else review, it is helpful to consider the following questions during the review process:

1. Will the case produce the intended learning outcomes?
2. Are the problem issue(s) presented in the case related to the learning outcomes?
3. Is the case sufficiently complete, complex and focused?
4. Does the case present a situation, problem, or issue?
5. Are all the elements of a narrative style used in the case (i.e., a storytelling style, the contextual descriptions of the situation, the portrayals of the central characters, the development of a series of events, and an interesting plot evoking different perspectives)?
6. Are the events and actions in the case sequenced in a logical order?
7. Are the events connected with appropriate transitional signals?
8. Is the content in the case accurate, relevant, and appropriate in terms of subject matter?
9. If there are external resources, are they appropriate?

Summary
The intent of this guide is to help you through the case writing process and avoid some of the pitfalls associated with case writing. If you have any questions or would like to discuss case writing with someone at the Center for Instructional Development, please contact CID@clayton.edu.

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