

Case study planner

Introduction

This booklet introduces strategies for developing active learning through the use of case studies. It explores:

- what we mean by case studies
- how using case studies can motivate and engage learners, and develop their skills, knowledge and understanding
- how you can plan case studies effectively to facilitate, monitor and assess learning.

It includes an activity, Case study approaches, to get you thinking about how you might use case studies. You can find an interactive version of this booklet with more detailed prompts and downloadable activities on the website.

Case study

A teacher* at Loughborough College implemented a holistic approach to teaching on the BTEC First Diploma in Health and Social Care. She encouraged each learner to produce a family case study supported by an album of images that represented the life story of their family. The principal learning from the Diploma was then linked to scenarios based on the 'family'. The learners were fully engaged from the outset and took control of their work, using the teacher as an advisor.

'The pictures bring the work to life...'

'We get to know and own our characters...'

'This way of working is much better than other ways...'

*We use the term 'teacher' as a generic term to include teachers, tutors, trainers, lecturers and instructors in the further education (FE) system.

What do we mean by 'case studies'?

Case studies come in many shapes and sizes. A case study can be a simple scenario accompanied by a 'What would you do in this situation?' question. It may require learners to carry out a simple role play to resolve a work-related conflict, for example; or it may be a simulation where learners are asked to apply recently encountered concepts, theories or procedures to a practical situation, for example, to devise a care plan for a client applying a set of principles and guidelines.

A case study may also be a substantial project where learners are asked to address a complex problem set in an authentic context using real-world data and documentation.

Key elements of a case study

Whatever form the case study activity takes, it has the following common elements:

- a scenario, usually with supporting data and documentation
- a statement of the issue or problem
- the requirements of the task or assignment (what the learner has to do).

The scenario should be based on a real-world situation, although you may choose to modify some aspects to simplify the information, or to protect the identity of individuals and organisations.

You would normally supplement the scenario by further authentic data and documentation for learners to analyse, although where the case study is very simple, this may not be necessary. Sources of information may take the form of:

- images
- video footage
- audio material
- supporting documents
- links to real URLs
- data tables
- quoted statements or testimony.

You could also identify experts whom learners can approach with specific requests for information or guidance, for example teaching colleagues or employers.

Most case studies ask learners to answer an open-ended question or develop a solution to an open-ended issue or problem with a number of possible solutions. By making the question open-ended, learners are forced to explore different courses of action. In most cases, there will not be one single 'right' solution. The answer or solution could take the form of a simple role play or short statement of a course of action to be taken, or it could be a fully developed action plan, proposal or decision.

Your case study should state clearly the requirements of the task or assignment, that is, what the learners are expected to do (although not how they should do it) and the outcomes they should achieve (but not the answer to the problem).

A simple case study

<p>You have a part-time job as a care assistant in a care home. One of the clients has a reputation for being difficult. She also has the early stages of Alzheimer’s and is not always rational.</p>	<p>← The scenario</p>
<p>The client complains to you that one of the other care assistants has stolen her hairbrush.</p>	<p>← The issue or problem</p>
<p>In groups of four, identify three courses of action you could take.</p> <p>Choose your preferred course of action and justify your choice.</p> <p>Present your outcomes to the whole group.</p>	<p>← The requirements</p>

In this case study, the teacher has limited the outcomes. They might provide further support by pre-selecting the information the learners need to access or by basing it on course content they have just taught.

A more complex case study

<p>An elderly patient is due to be discharged after a lengthy stay in hospital. You are given details of his current state of health and medical condition, home circumstances and personal preferences.</p>	<p>← The scenario</p>
<p>The issue is whether the patient should return to his own home and, if not, what arrangements should be made.</p>	<p>← The issue or problem</p>
<p>You have to supplement the information you have already been given about the patient by investigating the statutory and legal requirements relating to this case and by finding out what support could be available to the patient once he leaves hospital. You have to produce a report recommending an appropriate course of action that takes account of all the factors, and with a justification for your recommendations. You will have to prepare and present a summary of your report.</p>	<p>← The requirements</p>

Here the teacher has chosen a more complex issue and the solution is likely to be less straightforward. The learners also have to take responsibility for finding much of the information themselves, although the teacher could provide support by suggesting possible sources.

Organising case studies

You can ask your learners to approach case studies individually or in teams. Usually, case studies are used in teams so that learners can pool their expertise and share the workload, as well as developing a whole range of skills in working co-operatively. Case studies which require learners to work in teams are also more likely to be authentic as real work issues usually need inputs from a number of people who work together to resolve them.

You can ask learners to resolve the case study issue in a number of ways:

- Through discussing the issue objectively – ‘from the outside looking in’.
- By each looking at the issue from the perspective of one of the key players in the scenario, for example, client, doctor, social worker.
- By each taking on the role of different key players and playing out the solution
- A combination of the above.

You may want your learners to come up with a solution that is agreed by the whole group, or in contrast, to generate as many strategies and solutions as possible.

Why use case studies?

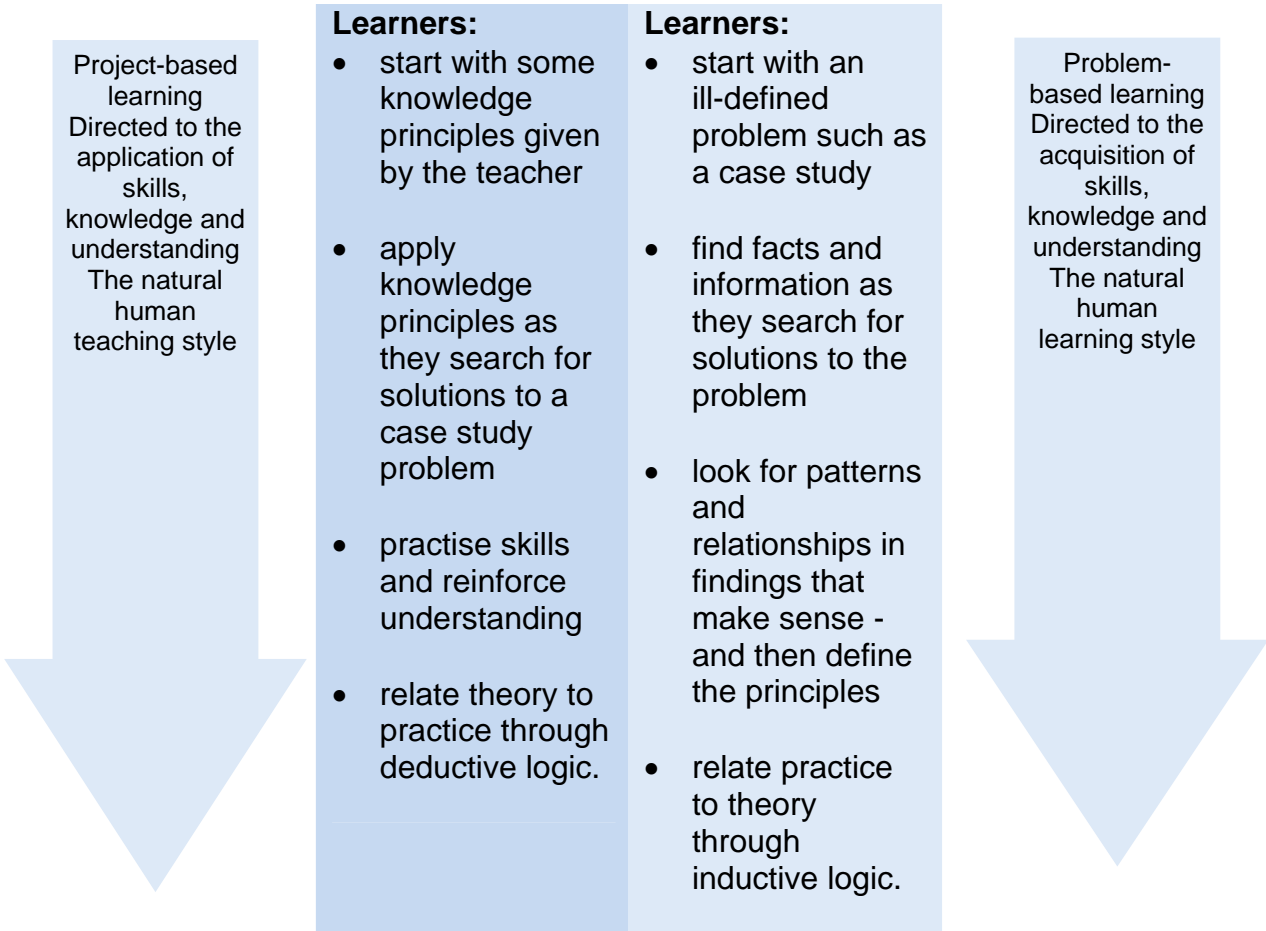
Case studies provide a stimulating context for learning that can engage and motivate learners. More specifically case studies can:

- provide a real-world context where learners can take on different roles, experience being a 'professional' and see how representatives from different services work together
- help learners to apply their learning and make connections between theory and practice (**Figure 1: Using case studies to relate theory to practice: a model** illustrates how either a deductive project-based approach or an inductive problem-based approach to learning can be taken by using case studies)
- allow learners to explore different perspectives and see how different people's attitudes, beliefs and circumstances affect decisions
- develop learners' skills in critical thinking, analysis and problem solving
- help learners to develop and deploy a whole range of skills in working co-operatively, including team discussion, listening and questioning, giving and receiving constructive feedback, conflict management
- develop learners' ownership of their learning as they organise themselves, review their progress and reflect on their decisions and experiences.

Encouraging learners to take responsibility for their learning is a critical step in helping them to develop as 'expert learners'.

You can also design your case studies so that learners have to draw on information and skills they have acquired from different areas of their programme in order to provide an effective solution to the problem you set them. This will help learners to see connections between different elements of their programme and understand their relevance.

Figure 1: Using case studies to relate theory and practice: a model



Case study

A Subject Learning Coach (SLC) in childcare and education at Bishop Auckland College created a programme of learning based on the concept of a persona doll that allowed specific themes to be developed across different topic areas. The persona doll case study was introduced to the Cache Diploma in Childcare and Education Year 1 learners during the college one week induction programme and embedded into two units of the qualification, Foundations to Caring (Unit 3) and Anti-bias Anti-discriminatory Practice (Unit 10). Learners were responsible for creating the persona of the doll (this included, for example, the name (Jack), parentage, family structure and cultural background). Over the following nine weeks learners created a 3D display of Jack's community and enhanced the original case study with scenarios of specific incidents in his life. The incidents allowed learners to explore themes such as equality and diversity, child development and multidisciplinary working.

'Jack has now become part of the class, learners treat Jack as if a child of nursery age and the expectations they have for Jack are very real...'

Subject Learning Coach

'Using Jack was very exciting. We took real life situations and applied these to Jack and then turned them around to encourage the group to solve real problems which have occurred in Jack's life...'

Learner

'Using Jack has helped me to understand how to make the environment and the setting reflect a multicultural society...'

Learner

Designing your case study

The big picture

Before developing specific case study activities it can be helpful, as a teaching team, to look at your curriculum as a whole and plan how and when you are going to use case studies.

Case studies can be particularly effective in developing certain skills and attitudes. These may be especially relevant to aspects of your curriculum. Some of your curriculum topics may be dull or difficult to teach or learn – using case studies may be a way of bringing them alive or making them more accessible.

Once you have looked at the big picture, think about the practicalities of developing case study activities.

How will you develop your scenario?

Your scenario should be:

- **authentic** and **up to date** – think about how you might seek support from local employers or other partners in developing your scenario
- **relevant** to the skills and knowledge learners are currently developing and to the experience they have – learners should be able to make connections between the case study scenario and their learning on different parts of their programme
- **appealing** to learners – you may want to use learners to co-create the scenario drawing on their experience from work, work experience or other settings.

Case study

A teacher at Sussex Downs College wanted to give her second year BTEC National Early Years learners a more realistic and engaging way of developing their communication skills. She also wanted to reduce the number of written assignments and develop assessment opportunities that were more related to workplace practice.

The virtual nursery is a long running simulation of the functioning of a nursery in which learners take the role of staff and carry out their work with a group of imaginary children. Task sheets and other supporting documentation are used to develop the activity.

Learner evaluation of The virtual nursery has been very positive. One learner directly attributed her success in gaining a place in higher education to the experience. They found the variety of assessment methods more interesting and more relevant than a succession of written assignments.

Are there clear learning objectives and/or outcomes for your case study activity?

These may relate to:

- **skills** – both vocationally-related and generic, including ‘soft’ skills; these can be cross-referenced to the personal, learning and thinking skills (PLTS) and to functional skills
- **knowledge** – of particular aspects of the learning programme, vocational area or world of work
- **attitudes and behaviours** – particularly important for the more ‘people-centred’ vocational areas, but also of value in developing effective team work in the workplace.

Learning outcomes can be for the whole group or can be differentiated to allow for more stretch and challenge. You might ask your learners to set their own individual learning objectives.

How big or complex do you want the case study to be?

This will depend on the experience your learners have of using case studies, their skill levels, motivation and capacity to sustain interest over time. Consider starting with short, simple case studies to introduce this as a way of working and to practise some of the generic skills required. Gradually increase the length, complexity and demands of the case study.

How structured should the case study be?

A tightly structured case study with clearly specified outcomes will be more appropriate if your learners are unfamiliar with this as a way of working. As your learners' skills and confidence develop, your case studies can be more loosely structured with more open-ended outcomes allowing learners opportunities to diverge and explore different ways of addressing the issue. However, the scenario, issue(s) and requirements still need to be clear.

What is the ideal group composition and size?

Groups should be as diverse as possible in terms of skill level, confidence and previous experience, gender, age and ethnicity. The group size will depend, to some extent, on the nature of the task. A one to one role play clearly requires only two group members (or three if an 'observer' role is created). Where a task simulates a work team, the number will need as far as possible to reflect an authentic team.

The most important consideration is that all your learners should have a meaningful role that requires them to make a genuine contribution to addressing the issue identified in the case study. Where groups are larger than six there is a danger that this will not happen.

How often should you change the composition of groups?

Groups will clearly need to stay together for the duration of a particular case study. If the timescale for your case study is short there may be advantages in using the same teams for a subsequent case study to allow team members to build on the working relationship they have established. In general, though, your learners will benefit from working with a wide range of people and taking on a wide range of roles.

The role of the teacher

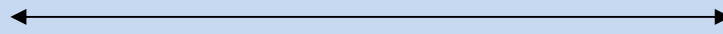
Planning and preparing

Much of your input as teacher (or teachers) will be in designing the case study and preparing supporting materials. You will also need to help learners to develop the skills they require in order to undertake the case study activities. Think about the following steps:

- Design or co-create the case study scenario making sure that it is authentic, relevant and appealing. As learners become more experienced, encourage them to create their own case studies.
- Ensure the issue to be addressed, the requirements of the case study and the roles allow all learners to engage at a level appropriate to their skills and abilities.
- Plan the activity or activities so that there are opportunities for deep as well as surface learning and for developing higher order skills.
- Decide how to assess both group and individual performance.
- Ensure your learners have access to adequate resources to address the issue identified in the case study. This may mean checking web-based resources, gathering and copying sets of documentation and data, approaching individuals with relevant knowledge and expertise, and securing their support (for example, employers or other teachers). The extent to which you pre-identify or signpost the information will depend on the skills of your learners and how demanding you want the case study to be.
- Ensure learners have the necessary skills and background knowledge (of theory and practice) to begin to tackle the issue identified in the case study. This may mean teaching some of the skills and/or knowledge in advance and providing opportunities for learners to practise those skills. Or it may mean providing ‘scaffolding’ to support them in the course of the case study. (See **Figure 2: Scaffolding continuum for skills development** and **Figure 3: Scaffolding continuum for information finding**.)
- Build in formative assessment and opportunities for reflection, including teacher feedback to individuals and group, time for sharing and review of group progress and learning, feedback for the teacher.
- Identify a base where learners can meet in their groups (for extended case studies).
- Brief learners to ensure they are clear about the expectations of the case study activity, how it will operate, what support will be available and include them in discussions about how the activity will be assessed.
- Help learners to establish ground rules for working as a team if appropriate.

Figure 3: Scaffolding continuum for information finding

High input



Low input

Teacher gives information to learners in manageable format.

Teacher checks availability of information and signposts for learners.

Learners decide what information they need and find it independently.

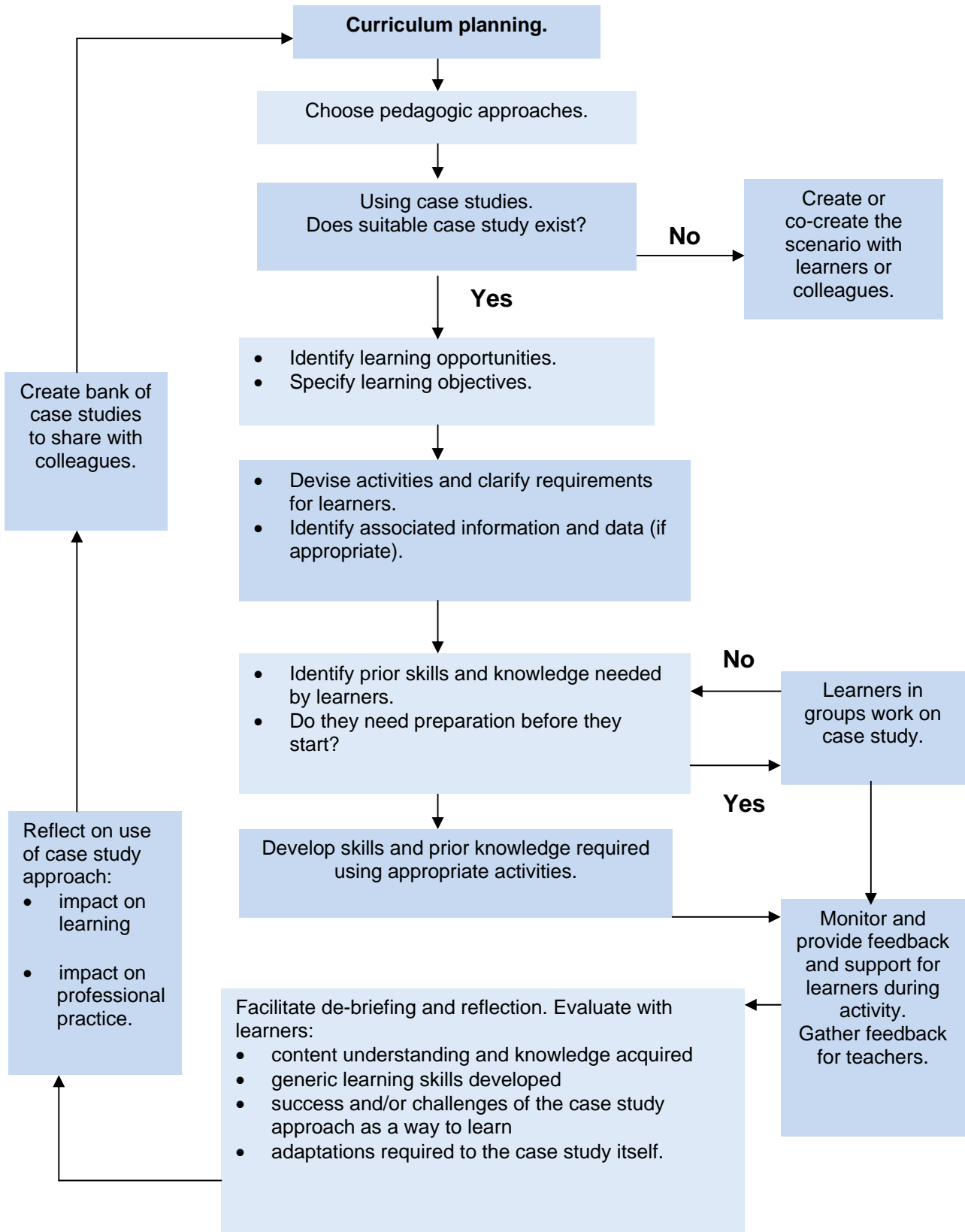
What next?

Try the starter activity, Approaches to case studies. Look through the resource on the website for more ideas on how you might use case studies with your learners, and to hear about other providers' approaches. Work in teams to start developing your case study approach. Identify any development needs you have within your team and plan to address these. Download the learner activities and use or adapt these to help your learners develop the skills they will need.

Case study planning checklist

To consider	Notes and actions
What are the curriculum areas being covered?	
How will the topic be introduced?	
What learning approaches will be developed?	
What are the learning objectives and/or outcomes?	
How could I include learners in creating the case study?	
What activities will be undertaken?	
How long will each activity take?	
Over what period of time will the learning take place?	
Where will the learning take place?	
What key, functional and PLT skills will be developed?	
How will the learning be assessed – for the group, for individuals?	
How can I include learners in developing success criteria?	
What opportunities will there be for checking and reviewing progress and giving feedback?	
(How) will the assessment contribute to learners' overall assessments?	
What baseline of skill(s) will learners need? How will learners be supported to develop these skills?	
What additional support will be required to meet individual needs?	
What additional resources are needed?	
When and how will the de-briefing take place?	

Implementing a case study approach: summary of the process



Continuing professional development (CPD) activity: approaches to case studies

Introduction

This activity provides an overview of the different approaches to case studies in teaching and learning. While there are situations where it is useful and necessary to learn from the experience of others, learning from one's own real life and work experience is often more powerful and engaging. This activity can be used by Subject Learning Coaches (SLCs) to lead a session to introduce teachers to the Society, health and development (SHD) teaching and learning resource materials.

Participants are given a card set which gives terms and definitions relating to the use of case studies (**Sheet 2: Key terms card set**). They are asked to place a set of 'key approaches' cards (**Sheet 1: Key approaches card set**) on a continuum of experiential learning (these can be arranged as a continuum or in a 'diamond nine' pattern). Finally, they are asked to link some 'key features' cards (**Sheet 3: Key features card set**) to the case study approaches. Participants can find out more about each approach by exploring the activities from the SHD materials that are printed on the back of the 'case study approaches' cards.

Learning objectives

Participants will be able to:

- define the term 'case study', 'role play', 'simulation' and 'scenario'
- describe a range of ways of using case study material in teaching and learning
- evaluate the case study approaches according to their effectiveness as a vehicle for experiential learning
- identify key features of each case study approach
- relate the case study approaches to the SHD materials.

Materials required

- Card set of key terms (Sheet 2).
- Card set 'key approaches' (Sheet 1) and 'key feature' (Sheet 3) cards.
- Continuum sheet.
- Sticky notes or blank cards for use by participants.
- Suggested responses (**Annex 2: Suggested responses to the continuum and diamond nine activities**) for the facilitator.
- Unlocking the resources poster.
- The SHD teaching and learning resources and either internet access or a PC or laptop.

Starting points

As this is a starter activity to introduce participants to the SHD materials and case study approaches, participants need no previous knowledge of them, though this would be an advantage.

You should be familiar with the suggested order of the continuum and the suggested positioning of all other cards before the session begins (given in **Annex 1: Continuum of key approaches to case studies** of this guidance). You should also be familiar with teaching and learning activities in the teaching and learning resource materials that are signposted by the cards.

There may be scepticism from some teachers about the feasibility of experiential learning approaches and its relevance to their practice. You should be prepared to acknowledge real constraints on implementing this approach, without losing the focus on the value of case study approaches. You will find the Talking teaching, training and learning card set and the Quick start pedagogy guides helpful in this respect. They can be downloaded from the website.

Overall timing

60 minutes.

Suggested approaches

Stage 1: What is a case study? (Suggested timing: 10 minutes)

Ask the group to look at the 'key terms' cards (Sheet 2) and consider whether they use the approach and how often.

Check that everyone understands the key terms.

Stage 2: Approaches to case study (Suggested timing: 10 minutes)

Give each group of about three to five people a set of 'key approaches' cards (Sheet 1) and the continuum sheet. There are two 'anchor' cards, marked with arrows which form the two ends of the continuum. Ask them to place the cards in a line according to the extent to which learning using that approach is experiential.

Allow some discussion about positioning but reassure participants that it is alright for there to be 'clusters' in the middle of the continuum.

Ask groups to justify their decisions, if ranking is markedly different from the suggested pattern.

You may wish to use the 'diamond nine' arrangement rather than the linear continuum. Try out both approaches before the session to determine which is most suitable for your group of participants.

Stage 3: Key features of approaches (Suggested timing: 10 minutes)

- Give each group a set of 'key features' cards (Sheet 3) and ask them to place the cards alongside a relevant case study approach.
- Encourage groups to add their own key features on sticky notes or cards.
- Ask groups to share their comments on the approaches.

Stage 4: Approaches to case studies and the SHD materials (Suggested timing: 30 minutes)

- Ask groups to turn over the 'key approaches' cards and give a brief description of the resource(s) listed. Use the Unlocking the resources poster to identify where participants can find further information about each resource.
- Invite individuals or small groups to choose an activity from the SHD materials and research it for 10 minutes and then feed back briefly on what they have found.
- End the session by asking participants to note down the ideas that they have had about using the materials in their teaching and the next step that they will take.

Personal and group action points

If the session has been successful, participants will have various ideas about how they might use the SHD materials in their teaching. The next step will be for teams to develop their ideas together about how they can do this.

Ideas for adapting or extending the activity

- The activity could be adapted for 'diamond nine'. This would minimise unproductive discussion about the precise ranking order in the middle of the continuum and give scope for more creative use of the cards by some groups.
- The activity could be used for other vocational and subject areas with some adaptation of the cards to signpost to different teaching and learning resources.
- A team that was very experienced in the use of case study, role play and simulation could place their own teaching and learning activities on the continuum.
- Other cards focusing on advantages, disadvantages and challenges could be added to the set to prompt discussion of particular issues, such as the need for team planning.

Annex 1: Continuum of key approaches to case studies

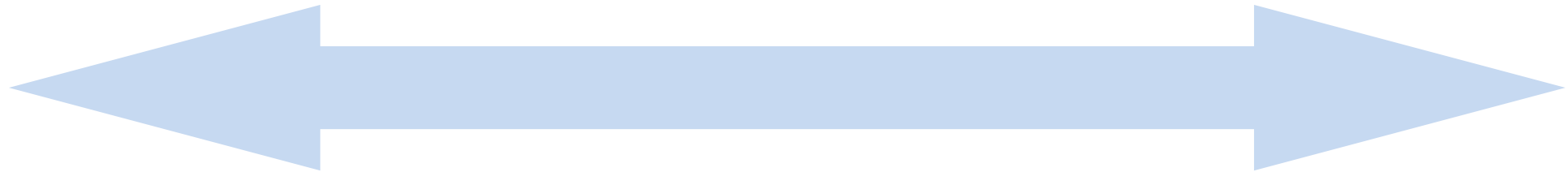
Other people's experience

Key approach	Key feature	Example activities from SHD resources
Teacher uses a written case study	Teacher can easily focus discussion on specific points	Daniel's story
Teacher presents scenario using multimedia	Case study is brought to life with images or sound	Barbara's story Daniel's story Kamala's story Tom's story
Mapping	Learners can make connections between people, services, policies and legislation	My neighbourhood
Storyboarding and sequencing	Introduces a time dimension and exploration of the consequences of actions	Sequencing Barbara's story
Video scenarios	Rapid engagement of learners in the scenario	Kamala's story
Short simulation; no role play	Good for discussing job roles and responsibilities	Virtual work settings
Role play based on scenario	Enables learners to practice interpersonal and communication skills	Virtual work settings Kamala's Story
Short simulation with learners in role	Learners get an empathetic understanding of job roles and responsibilities	Virtual work settings Barbara's story Daniel's story Kamala's story Tom's story
Long simulation with role play	Enables learners to work in a virtual work environment and develop team working skills	Virtual work settings

Learners' life and work experience

Annex 2: Suggested responses to the continuum and diamond nine activities

Continuum



Learning from other people's experience	Teacher uses a written case study	Teacher presents scenario using multimedia	Mapping	Storyboarding and sequencing	Video scenarios	Short simulation; no role play	Role play based on scenario	Short simulation with learners in role	Long simulation with role play	Learning from own life and work experience
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Learning from other people's experience

Learning from own experience through simulation and role play

Learning from own life and work experience

A ‘diamond nine’ of experiential learning methods in Society, health and development

1. Start with the card marked ‘Learners listen to the teacher and answer questions’ and then place the other cards beneath it. This represents the degree to which the approach enables learners to learn from their own experience of life and work. Complete the pattern with the ‘Learners learn from their own life and work experience’ card.
2. Match the ‘key features’ cards to the teaching and learning approach you think it describes best.
3. Turn the ‘key approaches’ over to see which resources you could use with that approach.

