On Teaching and Learning

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On Teaching and Learning publishes articles and essays on aspects of pedagogical practice and on research that has implications for teaching.

Letters and suggestions for articles or essays should be addressed to the Editors, 317 Science Center, Harvard University, Cambridge, MA 02138.

Published by the Harvard-Danforth Center for Teaching and Learning.
James D. Wilkinson, Director.

The Journal of the Harvard-Danforth Center

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Cover design: Evan Goldstein
Teaching by the Case Method: One Teacher’s Beginnings

Nona Lyons

It was not the first time I had used the case method or developed my own case to use in a class. But it was the first time I had structured an entire course around a set of cases, ones I had created. The course, “Curriculum Theory, Design and Evaluation,” was brand new, an introductory module of seven weeks duration intended for graduate students in education. In organizing the course around a set of cases, I quickly realized that I would have to wait until it was over to know if the case method of instruction worked in the ways I hoped it would. If it foundered at the beginning, I would have to change methods almost mid-course. Though somewhat apprehensive, I was also eager to experiment. Having recently participated in Roland Christensen’s seminar for Harvard faculty, “Developing Discussion Leadership Skills,” that used the case method, I was intrigued by the possibility of a match between a method, a course, and graduate students. For it seemed to me that case teaching, with its emphasis on discussion, might be a method of choice for fostering the skills of professionals; in this instance, masters and doctoral candidates in education. Although at first glance a discussion method may not seem a likely candidate for developing technical, curriculum development skills, I believed that there was a relationship between the method and the goals of the course. This paper presents reflections on my experience and suggests a clearly speculative way some of the complexity and unexpected facets and power I found in teaching, using the case method.

At the first meeting of the class, students, though of varied backgrounds, indicated their interest in learning about curriculum in order to create their own or to help others do so. Most planned to return to elementary or secondary schools as apprentice administrators; others, as teachers, would go on to settings that ranged widely and included a children’s museum and a trade magazine. One student, a dental technician, wanted to learn how to create a curriculum to teach a new dental procedure to other technicians. I had designed the course specifically to emphasize curriculum construction as a collaborative enterprise. In addition, the course was organized to introduce five different perspectives: the history and theory of curricula; the actual process of curriculum development; a developmental view of children, adolescents, and adults, that is, how a student’s own place in the life cycle might influence learning and curriculum construction; the politics of curriculum; and, finally, a systems view of curriculum development that ranged from the point of view of the classroom teacher to that of the state curriculum regulator.

In the compressed time frame of the course, the case method seemed especially useful for getting into issues in the actual process of curriculum development quickly. One goal in using cases was very specific: to help students gain skill in working with others. Without this skill, students would have a hard time transferring their classroom learning to the more complex world of the workplace. Supplementing the cases was a set of readings related to each of the five perspectives. Students were eager to work with the cases and there was a lot of anticipatory excitement on the first official day of class. What I did not realize then was the subtlety with which the cases would structure the class.

The Cases

Sarah Salt, Director of Curriculum and Staff Development of the East Suburbia School District, was the fictional star of the cases I created. In fact, she was the continuing star. I had decided to use a series of cases that would follow Sarah over time, beginning with her arrival as the new Director of Curriculum of the East Suburbia School District and continuing through the first three years of her job. My goal was to trade off the diversity of different settings — an alternative I had considered in creating the cases — for the purpose of seeing change over time. In this way, we could see how one professional, Sarah, grew in understanding a setting and gained skill in the practice of her craft. The cases were based both on my own experiences as a curriculum and staff development director in a suburban school system very much like East Suburbia, and on the experiences of several school administrators I had interviewed.

The introductory case did several things: it presented details of the setting — the East Suburbia School System, a middle class, college-oriented community Sarah Salt had just entered; and it introduced, too, the cast of characters who would figure in the tasks Sarah would undertake to address: the superintendent, the six principals of the District’s
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schools, and the various existing teacher committees addressing curriculum needs. The case hinted at the potential politics of a standing, District-wide Curriculum Committee and it detailed the pressing curriculum problems Sarah had been hired to address: the writing problem about which parents were becoming increasingly vocal, the officially-adopted elementary science program that most teachers were ignoring; and the social studies program, considered most in need of a complete overhaul. In working with this first case, students were to consider where and how Sarah Salt should get started in her job and to determine exactly what her first steps might be, keeping in mind that no one had told her how or what to do.

Each class was structured into three components: (1) discussion of the case; (2) discussion of the assigned readings to elaborate or contrast issues raised by the case; and (3) identification of what I call curriculum principles, a set of ideas about the process of curriculum development. In the class that introduced Sarah Salt, for example, we first discussed the facts of the situation. The class hinted at the potential 'testing' of students' ideas to become attached to a wider body of knowledge and than others. But the elements of the class — cases, readings, curriculum principles — masked a complex process, the transformation of my students' knowledge into materials that others would use. The final assignment of the course, the development of some piece of curriculum for use in a setting of the student's choice, was to be the test of this transformation. At first the case method did not seem directly relevant to that goal. On reflection it seems an even better match, more subtle and more powerful than I had appreciated then.

The Power of the Case Method

It is clear that the case method makes possible multiple learnings. Simply as a narrative, the case does several things simultaneously. It catches up all the contextual particularity of time, place and setting of a single instance, yet in its truncated action and on-going, open-endedness, invites each student to bring to it his or her own experience and skill. For example, Sarah Salt began her job in a school district composed of eager, involved, politically astute parents at a time when there was a decline in verbal SAT scores. Parents were eager to know what Sarah Salt would do about that. Further, she entered a school district with its own history. One particularity of that history included an active group of teachers who ran one of the oldest 'Teachers' Institutes' in the country. Teachers of East Suburbia were used to participating in their own professional development, as well as their own curriculum construction. Such were the realities of the setting Sarah Salt had entered, and they influenced her way of framing and trying to resolve problems.

For my students, the constraints of the particular situation simultaneously limited the choices of their suggestions for action and made some more appropriate than others. Thus, while a case began by inviting particular insights from students' own experiences and skills, it brought them to a new test when they were examined, rejected, accepted, or modified in class discussions. The narrative frame of the case allowed, in effect, multiple, interacting variables of real-life situations to be presented in all their density. The ensuing case discussion then made possible the 'testing' of students' varying 'hypotheses' for action.

Similarly, the case can act as a special counterpoint to other class learnings. In my course, the readings presented alternative perspectives on curriculum. These served to clarify student views and to extend them, sometimes giving new words and language to students' ideas. Sometimes, too, new information — such as the history of how others have thought about curriculum, aims, ideas and schooling — allowed students' ideas to become attached to a wider body of knowledge and
theory. But in the interaction with the cases, something special often happened that resulted in a unique combination of learning.

To illustrate, one of the best classes involved the case of the East Suburbs Writing Committee. In that case, Sarah Salt and a newly formed teacher committee were considering what to do about a suspicion that teachers were not using a District-developed curriculum on writing in spite of the high ratings it had received. Committee members themselves had helped develop the curriculum and shared the view that it was worthwhile. In the case, various proposals were put forth by the committee members to find out the degree to which the curriculum in question was being used. Some committee members suspected that the real culprit might be jealousy and competition among the District's traditionally independent teachers who were skeptical about any curriculum they had not developed themselves. The case ended with one teacher posing a new and different question, that is, about how teachers knew what students were capable of writing. In particular, she raised the question of when students knew how to edit their own writing. She wondered just what difference having this kind of knowledge might make to teachers as they tried to help students develop skill in writing. The teacher then posed a new question: might this knowledge and understanding influence curriculum development as well as teaching?

Our class discussion that day focused on a range of issues: methods of evaluating a curriculum; ways to test assumptions about curriculum use in school settings; ways to work with prima donna teachers; the role of principals in facilitating the implementation of new curriculum; and the issue of how teachers really do grow and change in their own fields. Only when we had exhausted the range of suggestions for actions that Sarah Salt might take, did we turn to the readings.

For that class, I had scheduled readings on Piaget's work and insights about children's and adolescents' developing competencies. But it was not until we turned explicitly to the readings that our deliberations took students into account. Not once had they been mentioned or consciously considered in our discussion of the case. It seemed we had forgotten the primary focus of our efforts — the learning and development of students. That day, class ended with the formulation of another curriculum principle: "In developing curriculum, always consider the developmental stage of the student."

I suspect that the case method allowed students to understand that developmental perspective in a special way. Having already worked through the situation within an already familiar context, students could attend fully to a new issue, in this instance, the developmental competencies of students. And doing so was made all the more compelling by the sudden sense that this issue might have been left out. That new aspect could then be attached to the multiple factors already considered. The case thus served both as a foil to assimilate new knowledge and as a way to emphasize different formulations of problems.

**Transforming Student Knowledge**

Perhaps the most challenging task of the course was moving from discussion about to the actual development of curriculum. I saw this task as a culminating activity, one that would bring together all the features of what had been learned in the course. For my final assignment, I instructed students to develop and write up one piece of curriculum, and then to critique their project from at least one or more of the perspectives discussed in class, e.g., the developmental perspective, a political one, etc. We ended the course with a "Curriculum Fair" where people who were actually developing different kinds of curriculum for use in several different settings presented their work to our students. These included the director of a Holocaust Curriculum, a member of a "Critical Thinking Skills Development" project, and a young playwright who had created an unusual and fine curriculum, a play about Dorothy Day.

At this point in the course, nearly at its end, I believed that there was no real connection between the cases and the curriculum development task students now addressed. Nor did I think there needed to be one. But on reflection now, I see a connection that appears especially significant, one the case method makes possible. It involves what I will call the skill of "imagining." It is a skill that can be applied in new instances, exactly as one would wish a skill to be used. For example, in creating a new piece of curriculum, students clearly have to transform their own knowledge of science, math, history, nutrition, or whatever into materials for other students. They must consider the appropriateness of the curriculum for the individuals involved, whether children, adolescents, or adults. But there are a host of other considerations as well — like those of the setting and the contexts in which learning will take place. These cannot be divorced from curriculum construction. The case method allows "imagining" to take place — seeing in the mind's eye how the curriculum will fit into a given context. The case method gives students practice in placing their work in real and complex settings, trying it out, and predicting, given the variables involved, what might reasonably happen. Knowing one setting — such
as Sarah Salt's — alerts one to the multiple features of any, and to the unintended consequences of one's actions.

**Reflections on the Case Method**

It seems, then, that the case method offers a technique that has several useful features, ones I would like to understand better. Three that were revealed most clearly for me were:

- The case method, through its narrative, acts to hold together complex variables, mirroring the particulars of real-life situations.
- Case discussion makes possible the testing of options students offer for action in problem solving, allowing them to present and test their "hypotheses" and to consider those of others as well.
- The case method fosters in students the process of "imagining," that is, the forecasting of what might happen to their hypothetical plans under certain conditions in particular settings.

I also have several reservations about using the case method. The major one concerns what Jerome Bruner calls problem finding. In presenting a case, the case constructor must clearly identify and sort all the important facts of a situation into a problem. But it is the discovery of relevant data, views and perspectives that is one of the more significant skills educated professionals need to learn. It would seem that one important test of the usefulness of the case method might be to ask students to create their own cases.

A second issue raised by using the case method seems more complex. It also concerns the processes of thinking that the case method fosters. I am struck that most cases or series of cases do not involve the same people or setting. Cases usually involve individual instances. But if professionals actually gain skill over time, and skill in part depends on knowledge gained in a setting, then the use of individual cases may mask that development and knowledge — what Donald Schon calls "knowledge in practice."

My hunch is that a potentially important direction for case development as a teaching method may be in the use of cases that do follow people over time and attempt to replicate the kinds of knowledge and skill they develop. Of course, there is no guarantee that this might happen just by following an individual over time. I had tried that myself. In following the fictitious Sarah Salt, I had intended that students really see how she dealt with a series of problems, how these changed over time and why she took the actions that she did. But on reflection I see now that I did not even touch the topic of how her thinking and practice as an administrator had changed. This remained implicit. And I still need to understand how to make it explicit to students.

One clue may come from one of the case method's clear strengths — its fundamental emphasis on discussion as a way of learning. Through discussion students really do have a special opportunity to engage in a learning practice they themselves will use with students of their own. Of course, the instructor must have skill in leading a discussion for this to happen, to make his or her students aware as well. But joining a set of cases that follow the development of one professional over time with emphasis on reflection about what is changing — how one's own ways of approaching problems change, for example — may be one approach to the complex phenomena of practice. Role playing situations could serve, too, to emphasize the actual kinds of thinking in action that practice entails. I plan to revise my cases and to create new ones. I am impressed that the case method is a method of promise for teaching professionals and their teachers.
Parting Thoughts

I have touched on but a small part of teaching here. The mechanics as to what to do and what not to do are obviously based on personal experiences and are geared to my personality. I do feel, however, that knowing the options may be of some value to you in your work. The thing which I have failed to communicate is how little of all of this is actually work. As I look back through this paper, I am saddened to discover that I have not really revealed the joy of college teaching. I was trained to do research, trained to increase knowledge, but it means so little if I do not have the opportunity to communicate it. How often I have wanted to shake a student by the shoulders and blurt out the answer for what appears to me to be so obvious. That is the temptation of the teacher. But how much more satisfaction I have received when a student has slowly plodded through the reasoning process and discovered the solution for him or herself. Teaching is indeed a funny business. How often you seem to be wasting time when you could just as easily do the job yourself. But as the years pass by and you see those very same students accomplishing things that you never dreamed of doing, you know you must be in the right business.

Acknowledgments

A more informal version of this essay was presented at the 1987 Fall Teaching Orientation of the Harvard-Danforth Center for Teaching and Learning. I would like to thank Eric Kristensen for inviting me to participate in this session and, thus, providing the stimulus for committing to paper what has been in my head.

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