

## The “Reverse Case Study:” Enhancing Creativity in Case-Based Instruction in Leadership Studies

**Timothy N. Atkinson, Ed.D.**

President and CEO

Arkansas Science & Technology Authority

Affiliate Faculty

Interdisciplinary Ph.D. in Leadership Studies

University of Central Arkansas

timatki@gmail.com

### Abstract

In this application brief I share a case study assignment I used in my *Leadership in Complex Organizations* classes to promote creativity in problem solving. I sorted Ph.D. students into two teams and trained them to use creative writing techniques to *encode* theory into their own cases. A sense of competition emerged. Later, teams swapped cases for analysis and *decoding*. The approach became known as “reverse case study.” Summative course evaluations revealed four important instructional themes: (1) students were able to apply and learn leadership and organizational theories, (2) students were able to build rapport and create bonds with fellow students, (3) students explored creativity, and (4) students explored the perspective of “the other.”

### Introduction and Background

Case-based instruction is a popular method for teaching leadership and management; however, the method is criticized for excluding student experiences (Cova et al., 1993), for being non-realistic (McCarthy and McCarthy, 2006), and for lacking student participation in the narrative (Cunliff, 2002). Recent approaches to improve case-based instruction have involved creating live cases from the news (McWilliams and Nhavandi, 2006), increasing the role of narrative in learning (Goodrich et al., 2005), and using creative writing techniques to *analyze* and *evaluate* cases in organizational ethics (Atkinson 2008). Scholars have also reported enhanced problem solving skills with case-based instruction that was especially attentive to class structure, content encoding, and theory (Harkrider et al., 2012, Harkrider, 2013, and Johnson et al., 2012). Wasserman (1994) suggested using creative writing in case-preparation for teachers, and Laditka and Houck (2006) suggested using student-developed cases in learning, but Atkinson (2008) further suggested using creative writing techniques in student-developed cases to enhance the method and the overall student experience.

Recall that Bloom’s taxonomy categorized educational learning objectives into six categories: knowledge, comprehension, application, analysis, synthesis (creativity), and

evaluation (Bloom, 1956), and later, Anderson and Krathwohl (2001) promoted creativity (synthesis), evaluation and analysis as the highest order educational learning objectives. For the most part, traditional case-based methods seem heavy on the “analysis” and “evaluation” objectives and lighter on “creativity”. Following Jenkins and Dugan, (2013), then, the goal was to question and improve my own methods in leadership instruction. My question became; “Can we enhance “creativity” through case-based instruction to improve the overall student experience?”

To address the question, I designed a case-based instructional method that uses same creative writing techniques suggested by Atkinson (2008): setting, plot, characters, conflict and conclusion. By combining these creative writing metaphors with leadership theory, I hoped students would achieve what Ward (2001) called “conceptual combination” and “creative cognition,” which involves merging disparate concepts to create something new, and thereby enhancing creativity.

## **Method**

### **Settings: Organizational Level Creativity**

First, I asked students to set the stage and describe the setting in terms of organizational theory. We used the Scott and Davis (2007) and Bolman and Deal (2008) texts to learn the characteristics of rational, natural, and open systems or structural, human resource, symbolic, or political systems respectively. I asked students to construct the setting based on the readings, but *not to actually name the theory they were using.*

### **Characters: Individual Level of Analysis**

Next, I explained to students that characters in creative writing are like models of people in life, stories, and the case study. I noted that characters have a point of view about life and they give us some insight into cognition, understanding, and saga. Authors often tell us what is in the mind of the character. In real life, however, thoughts are mostly hidden. Real life characters only provide cues to organizational culture and tradition by what they say and how they act. Also, creating motivation in an individual fictional character is the bulk of the creative challenge (Novakovich, 1998). I asked students to use character to study challenges to identity, social interaction, and sensemaking (Weick, 1995). I asked students to consider neuro-leadership under character (Rock, 2006; 2007; Ghadiri, Habermacher & Peters, 2012). I instructed students to develop characters using the characteristics of the behavior and to avoid directly naming the theory.

### **Conflict: Organizational Change and Goal Conflict**

After an environment was created, characters were established, the conflicts and struggles were supposed to be obvious. I explained to students that conflict emerges from the clash between individual personality preferences, leadership preferences, and changes in overall

organizational systems. I instructed students to describe a character or group acting out the leadership perspective (written under character) in a conflicting organizational system (written under setting), and to show what problems would emerge if the organizational setting or other characters were incompatible with the leadership perspective or vice versa.

### **Plot: Organizational Strategy or Innovation**

Novakovich (1998) noted that character struggles drive the plot. Conflict and Plot are connected to Character and Setting. As noted in the previous section, there are multiple ways to create organizations and leaders engaged in “struggles” or “conflicts” that could emerge at any level of analysis. I instructed students to show the characters in conflict with other characters, through goal ambiguity or through incompatible or inconsistent leadership approaches. I asked students to show how changes create conflict in leadership perspectives and how goal ambiguity can cause dissonance. Students had the options of showing an organizational response to external forces, internal forces, etc., but not to simply say, “George and Malinda are in conflict” or say, “When the law of the state changed, the organization changed.” Students had to show the conflict and show the changes.

### **The Ending: Or the Shift in Organizational Perspective**

Finally, I asked student teams to focus on competition and fun by leaving the other team hanging on the conflict and the unanswered questions. I asked students to create detractors to keep the other team on its toes. Also, I asked students to consider designing a case that would allow for an analysis of Strengths, Weaknesses, Opportunity and Threats (SWOT), or to consider designing a case for an Appreciative Analysis, which involves “appreciating what is, envisioning what might be, dialoging about what should be, and innovating what will be (Cooperrider, Whitney and Stavros, 2008, p. 16; Whitney & Trosten-Bloom, 2010). The Appreciative approach is otherwise known as an analysis of Strengths, Opportunities, Aspirations, and Results, or SOAR (Stavros, Hinrichs & Hammond, 2009).

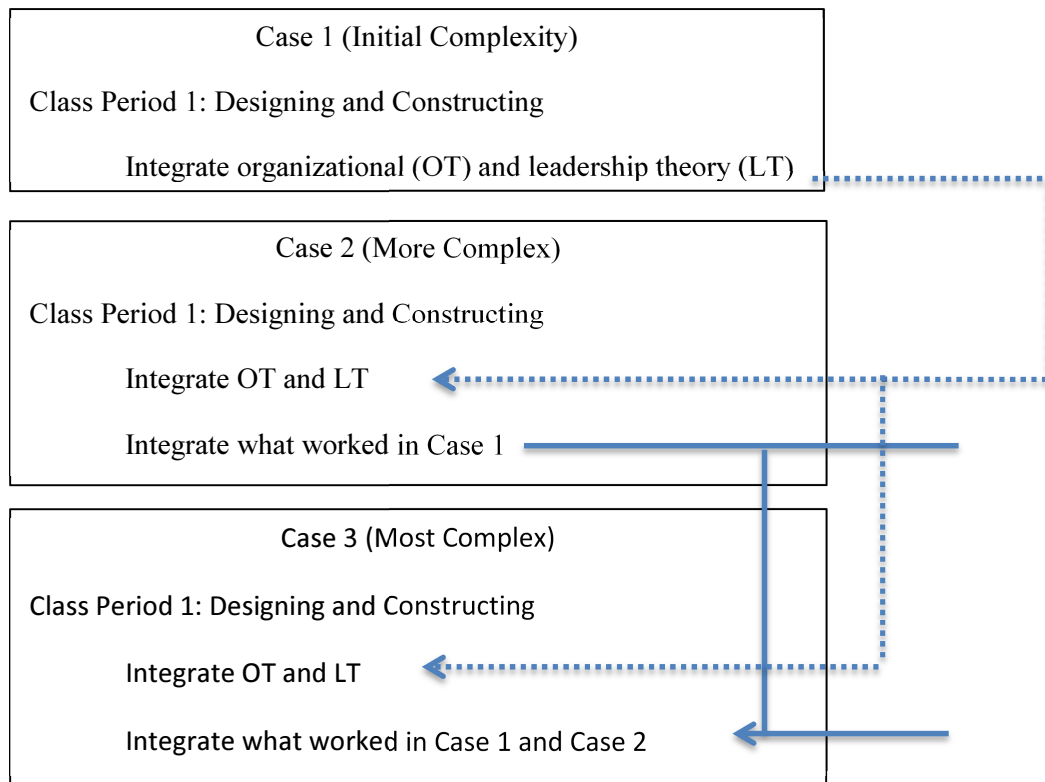


Figure 1. Framework for building complexity (scaffolding) and implementing reverse case study

## Building Complexity in Subsequent Class Periods

Following Harkrider et al. (2013), Harkrider (2013), Wolf, Brush and Saye (2003), I felt it was important to slowly build complexity (or use some scaffolding) over the course of the semester (Figure 1), so I made certain Case 1 dealt mostly with learning the method of encoding theory into the cases through creative writing techniques. In Case 2, I added the basic SWOT analysis for the competing team. Finally, in Case 3, I allowed students to use SOAR, SWOT, or both. At each stage, I prompted students to improve the case with my comments and their observations. In summary, students created an organization (built in the organization theory), its leaders (built in a theoretical leadership perspective) and its problems along with detractors to throw off their opponents.

## Implementation Plan

- 1) ***Coach the New Method.*** I planned two class periods for each case. Students used one class period to create the case and a subsequent class to analyze and evaluate the other team's case. Objective: engage creativity, analysis and evaluation together (Bloom, 1956; Anderson & Krathwohl, 2001).
- 2) ***Coach Encoding.*** I evaluated the newly minted cases and provided feedback to ensure students were showing theory. For example, I wanted students to describe rational system characteristics without actually typing the words "rational system." I called this the "encoding" phase based on Harkrider et al. (2013) and Harkrider (2013).
- 3) ***Decoding and Evaluation.*** In the second class, I made sure competing teams explained which theories were "in play" in the other team's case. For example, I wanted students to name "rational systems" by identifying the characteristics or name "transformational leadership" by noticing the characteristics. I called this phase the Decoding and Evaluation phase.
- 4) ***Increase complexity phase 1.*** I repeated steps 1-3 for Case 2, but I ensured students corrected errors at each stage. I ensured that students added strengths, weaknesses, opportunities and threats (SWOT) along with the theory.
- 5) ***Increase complexity phase 2.*** I repeated steps 1-4 for Case 3, corrected errors, and asked students to add detractors along with SWOT or SOAR to increase competition and levels of analysis.
- 6) ***Summative Evaluation.*** In the end, I hoped students were able to identify theories in action, organizational contexts, and be able to create, analyze, evaluate and discuss organizations.

## Evaluation of the Method

I developed a two-question, open-ended evaluation on SurveyMonkey, and obtained Institutional Review Board (IRB) approval before sending out the questions. The two questions

were: (1) describe in some detail what was helpful about reverse case-instruction? This includes team dynamics, and (2) List the ways reverse case study contributes to the learning environment. This includes team dynamics. Fourteen (14) Ph.D. students responded to both questions. I downloaded the responses from SurveyMonkey and analyzed them with MS Excel.

Using coding procedures described by Saldaña (2009), I selected pertinent “in-vivo codes” or direct student responses, and finally performed initial and focused coding. I applied discourse analysis to important phrases, especially when students used common language to describe experiences, and when they used language for cognitive processes such as “understand,” “think,” “know,” etc. (Gee, 2011).

## Results

Four clear themes emerged; however, I am open to other interpretations that may help us delve deeper into the usefulness of the method. I think the students felt that reverse case study helped them, (1) apply and learn theories, (2) build rapport and bond with their classmates, (3) use creativity, and (4) understand the perspective of the “other.”

### Apply and Learn Theories

The theme “apply and learn theories” emerged as the strongest theme among students. A sample of statements reveals that students were able to apply theory to practice:

*“I felt that the reverse case study provided the opportunity to apply the information we were reading to organization types that we encounter in our everyday environment.”*

*“It also moved the discussion to a higher order level of thinking, allowing us to analyze what was learned in the course to utilize it in our story.”*

*“The reverse case-instruction was very clear to understand and related to our class reading assignment.”*

*“As I said above, the reverse case-study helps to take the words off the page and bring them to life through application.”*

Almost all students responded in a similar manner. Phrases such as “higher level of thinking” and “understand assignments” appeared to indicate learning in process and meeting the cognitive educational objectives. Students used the terms “opportunity” and “allowing” in these phrases to indicate the opportunities were rare in prior instances and that the reverse case study opportunity was new or welcome.

### Building Rapport and Bonding

The theme “building rapport and bonding with teammates” was unexpected as well. A sample of statements for bonding and rapport are as follows:

*“I honestly feel that I got to know some of my classmates a lot better and learn each other's strengths and weaknesses.”*

*“[I] love the way we got a chance to interact with our classmates, this personally allowed me to feel more comfortable around my classmates and express myself more.”*

*“[T]he fact that the other team were such jerks to us helped unite my team - spurring competition and the motivation to do better each time.”*

*“The reverse case study actually gave students an opportunity to work together and develop a case study.”*

*“I appreciated the bounce-back generated from the discussion with other team members.”*

Naturally, students expressed these bonds in different ways, such as “the chance to interact” and “gave students an opportunity” both of which suggest these opportunities were rare in prior circumstances. The ability to “express oneself more” is an important skill for leaders and learners of leadership as well.

### **Perspective of the Other**

I did not expect the theme “understanding the perspective of the other” to emerge, but it became key to measuring success of the method. The following samples appeared to indicate making the leap from concept to application:

*“This process presented opportunities for seeing others' understanding of concepts that we read about but perhaps didn't fully understand.”*

*“I think this was particularly beneficial for those students who had not been in leadership-supervisory positions as it provided them the opportunity to “think like a leader would think” in similar situations.”*

*“We learned about our team-mates, how they think, what values they place on things related to work, how they would react to a situation, etc. –“*

*“Exposure to varying theoretical perspectives of classmates, and how these perspectives frame their decision-making processes.”*

We want Ph.D. students to break away from their own perspectives and see the world in light of theory and in light of another's interpretation. Reverse case study appeared to do this while maintaining rigor, fun, collaboration, and creativity.

### **Creativity**

Because the method used creativity as a grounding framework, it was not surprising to me

that creativity emerged in prominence among the respondents. The following samples were representative of the value students placed on using creativity with theory:

*“We were also able to be creative, which was even more fun in the group environment.”*

*“Everyone enjoyed developing characters for the case study -- It brought the group closer together because we learned about each other”*

*“This also allowed us to use our creativity in so many ways, from the type of business, red herrings, organizational challenges and leadership issues.”*

*“The reverse-case study assignments allowed team members to apply their learning to a situation in a creative manner.”*

*“We had to be creative with the reverse case-study, and our teacher comes around to make sure we are on track about what we are supposed to be doing.”*

*“Character development and scenario development allowed for members to be creative while using material covered in class –“*

The varying responses added to the richness of this particular theme. Not only did students connect creativity to “fun,” but in some cases to “innovation,” “problem solving,” and “critical thinking” as well, which confirmed Ward’s (2001) notion that combining concepts can create something new and contribute to problem solving.

## **Conclusions and Recommendations**

I think reverse case-based format was a successful way to infuse creativity into the learning process. One student offered an important and interesting summary about the reverse case study experience:

*“A competitive spirit quickly emerged as the different level of case studies became obvious. Again, this did not come from the instructor but from team members and individual personalities. I think the process was successful but I could see how the activity would require more management from the instructor if working with less motivated students.”*

The student thought about the process of thinking, which indicates self-reflection and metacognition. More motivated students may indeed be aware of this thinking about the activity while doing it. If implementing the program with a less motivated student, the instructor might need to prepare for more involvement or maybe a different scaffolding design. The method should probably not be assigned as an individual task because the teamwork and competition was clearly important. The competition between groups, the interaction among group members, the availability of the instructor in this environment, and the gradual presentation of material all worked together to create the experience. It is important for the instructor to be present and



monitor showing, not telling or naming. Finally, I would suggest that reverse case study is at least a good complimentary approach to other class assignments, but I found it rewarding as an alternative approach to all my case-study assignments.

### **Basic Recommendations for Reverse Case Study**

- (1) Build complexity slowly using Figure 1 as a guide and the summary implementation plan.
- (2) Always assign reverse case study as a group task when possible.
- (3) Create and promote an atmosphere of fun competition.
- (4) Monitor progress and make corrections along the way. The basic dogma is “show don’t tell.”
- (5) Make sure students self-reflect and think about the process. Discuss these thoughts in class.
- (6) As an instructor, be present during the phases. Be a guide. Be a mentor.

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### **Author Biography**

Tim Atkinson, Ed.D., is the President and CEO of the Arkansas Science & Technology Authority (ASTA), a state government agency that promotes Tech-Based Economic Development. He received his doctorate in higher education from the University of Arkansas at Little Rock, an M.Ed. in Higher Education from Peabody College at Vanderbilt University, and a B.S. in Biology from Tennessee Technological University. He earned a Post-Graduate Certificate in Institutional Research from The Florida State University. Before ASTA, he was Assistant Provost and Director of Sponsored Programs at the University of Central Arkansas, where he maintains affiliate faculty status in the Interdisciplinary Ph.D. in Leadership program. He teaches graduate courses in organizational theory, leadership, grant writing, and budgeting. His research interests are in organizational theory, semiotics, leadership, higher education and research administration. His prior publication on case-based instruction was “Using Creative Writing Techniques to Enhance the Case Study Method in Research Integrity and Ethics Courses” in the *Journal of Academic Ethics*, 6(1), 33-50 in 2008.