More Advanced Methods:  
The Case Study and The Role Play

Lecture 8

Learning Objectives

- Describe the case study and the role-play.
- List the advantages and the disadvantages of each.
- Explain when you should use the case study and the role-play.
- Discuss how you should conduct a case study and a role-play.
- List and describe the steps for writing a case study and a role-play.

Why learn this?

- For a instructor who wants to be as effective as possible, he needs as many different methods of presentation as he can get.
- These help:
  - Add variety to the presentations.
  - The students have more input into the lessons or even have more control on how they progress.
  - Reach the outcomes of the performance objectives more perfectly.
Basic or Advances Methods?

- The basic methods are the Theory and Skill Session methods.
- Unless a trainer has a thorough grounding in these basic techniques, he or she should not use more advanced techniques.

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Deciding to Use an Advanced Method

Examine Five Variables

- Trainees have the motivation to put in the additional energy that the advanced techniques usually require.
- Trainees have a sufficient level of maturity to accept the less structured nature of the advanced techniques.
- The complexity of the topic. Advanced methods are better for more complex content.
- The time available. The advanced techniques tend to require more time.
- The return on investment. Is the additional time and effort worth it?

Take Care When Using Advanced Methods

- The more advanced techniques of the case study and the roleplay, while uncovering information for the learners, may also involve an emotional component.
- The issues raised are usually complex and raise a variety of memories for the trainees; some of these memories may include positive or negative feelings.
- You must be willing to accept and cope with these emotions and feelings and, indeed, use them as part of the rich resources available.
The Case Study

- A description of an event that involves some problem or problem situation which requires in-depth group discussion of real-life situations. Often has:
  - A narrative element
  - Sufficient background material to make the problem seem real and to allow the development of real solutions.
  - A (sometimes) narrow theme to ensure that the experience results in a specific educational outcome.
  - Several questions that follow for the learners to ensure that this specific outcome is achieved.

The Case Study (cont.)

- The case is usually presented in written form, or if appropriate, the trainer can use visual and/or audio inputs.
- Amount of detail may vary greatly
- Involves some form of debriefing activity, often a small group discussion.
A Good Case Study

• Requires...
  – reading
  – study
  – analysis
  – discussion
  – free exchange of ideas
  – decision making
  – the selling of decisions to others

Major Advantages -- Case Study

• Encourages transfer of learning by bringing the learner closer to the real world.
• Specific theories and principles underpin most case studies, but learners discover these by examining a practical situation rather than by simply being told about them.
• Encourages an exchange of ideas, opinions, and views among learners, broadening each individual’s perception and analytical process.
• The analytical process itself is emphasized (i.e., discovered and practiced by trainees).

Disadvantages -- Case Study

• Because it focuses on a specific episode rather than the total situation, the case study tends to give a tunnel view.
  – Learners may fill in the background with their own individual past experiences. This can lead to widely differing solutions.
• As the people in the case study are not known personally, the learner becomes somewhat detached because the events are happening to a stranger.
  – This may lead to lack of commitment to solving the problem.
Disadvantages (Cont.)

• In longer, more complex case studies, the learner can become frustrated with the sheer volume of information and the slower pace of learning.

When to Use the Case Study

• to promote thoughtful discussion of the significant factors in a situation.
• to develop judgment, critical thinking, and problem-solving ability.
• to deduce principles of management or leadership,
• to build human relations skills, and
• to read for meaning and recognize the importance of context.

When to use a Case Study (cont.)

• When the instructor has discussion, evaluation, and feedback skills.
• When sufficient time is available for discussion of various problem solutions.
• The learners have had sufficient time to read and digest the material.
Considerations:

• Good case studies can be difficult to write.
• They need to contain enough facts to be completed without making up information. Yet, the information should be organized in such a way that the solution is not obvious.
• Incomplete or incorrect information, too much extraneous or confusing information, and cute or funny names often detract from the effectiveness of a case.
• This can cause the participants to become frustrated and direct their energies toward attacking the case, rather than working it.

Postcase Discussion

• This is probably the major factor in the learning effectiveness of the case-study technique.
• Plan the discussion in advance in order to isolate and highlight the crucial points to be learned from this case.
• Develop questions you might use to bring out these points if the learners do not address them. (Put in lesson plan or add as an attachment.)
• Develop a “solution handout” to pass out to learners after the discussion. (It is part of the lesson plan)

Related strategies:

• Action maze
• Exercises
• Incident process
• In-basket exercises
• Role play
Action Maze

- A printed description of an incident, for analysis, followed by a list of alternative actions.
- Participants choose an action which directs the participant to a new page, which gives the results of that action.
- A new set of alternatives are shown from which an action must be chosen, and so on.
- The results the participant receives after each step may give more information, as well as a reaction to the action taken.
- The selection may also lead to a dead end, sending the participant back to the original situation to make another choice.

Exercises -- Similar to a case study

- The exercise is a short problem focusing on a specific learning point.
- Most exercises have one correct solution. A group of exercises may be used as a test.
- Use them to demonstrate newly learned procedures and principles, prior to attempting to apply the knowledge to more difficult and complex case studies.

Incident Process -- A Case Method Variation

- An short and lacking in detail incident is presented.
- Participants then question the instructor to determine the data needed to complete the assignment. The instructor gives out pertinent facts only when participants ask for them, forcing the participants to reconstruct the entire situation.
- Often, an observer-reporter records group interaction.
- Participants examine the present, unravel the past events leading up to the incident, and identify future implications resulting from the incident.
- The process emphasizes the gathering of pertinent information in order to arrive at a decision.
Role-plays fall into two main categories.

- The Preplanned role-play
- The Spontaneous role play
The **Preplanned role play** is basically an extension of a case study.

- The problem is acted out rather than just described.
- Selected learners who are playing roles are given role descriptions (or briefings), while the others are given detailed observation guides that indicate what they should look for during the role-play.
- All participants receive a background statement.
- The roles that trainees are asked to play are clearly detailed and may be quite different from the trainees' usual behavior.

The **Spontaneous role play**

- This one happens when a learner is given a role in which he or she basically plays himself or herself but "tries out" a certain new behavior to expand his or her range of responses.
- While role briefings are minimal, detailed observer's guides are required.

For example, during a session on counseling, a role-play may follow a discussion on **empathy**. A learner is asked to act as a counselor and to display as much empathy as possible. In the absence of further role definition, the learner will usually behave as he or she normally would, except for attempting to increase his or her empathetic behaviors.

**When to use it?**

- To help the transfer of learning by bringing the instruction closer to the real world.
- To help learners observe and practice new ways of behaving.
- To emphasize good human relations skills.
- To demonstrate that a person's behavior is not only dependent on his or her personality but also on the situation within which the incident takes place.
- To create new insights by taking the learner out of the usual sequential cognitive process and confronting him or her with new and more complex information.
Other times to use . . .

- When the objective is to change attitudes and/or behavior, to understand the perceptions and feelings of others, or to develop communication or interpersonal skills.
- When the learners would be motivated by working on a real problem.

Advantages

- Allows participants to experience and try out new learning and receive immediate feedback
- Totally involves participants
- Is relatively easy to develop
- Provides some realism
- Economical, unless video equipment is rented for videotaping
- Can be enjoyed

Disadvantages

- Inept or inappropriate handling by the instructor can cause negative reactions in the learners.
- The learners may not take the experience seriously, and it degenerates into a farce.
- Irrelevant facts and issues may be introduced that disrupt the role-play and its subsequent debriefing.
- The role-play may become stilted because the participants are not good actors or become self-conscious.
Important Consideration!

• The instructor must have good observation, evaluation, discussion, and feedback skills.

Conducting the Preplanned Role Play

• The instructor introduces the role-play, sets expectations of the trainees and promotes an atmosphere of trust.
• Check that all learners understand the background of the situation, the role-players understand their roles, and that the observers understand their guides.
• The role-play is enacted.

The instructor encourages learners to stay in role (if necessary), checks that the observers are working, steps in if the role-play goes off target or becomes too traumatic, and stops the play at an appropriate time.

• De-role the participants.
• Conduct the postplay discussion. This step is a critical stage in learning from a role-play.
• Gather and publish the data entered on the observers’ sheets. Crucial aspects of the learning experience should be identified and highlighted.
• Depending on the objectives, provision may be made for all learners to engage in practice role-plays so that they can begin using the new behaviors illustrated, identified, and analyzed during the session.
The instructor de-roles the role-players.

- The instructor must ensure that role-players are satisfactorily separated from their roles.
- Emotions and feelings generated in a role-play are real to the player and may be difficult to turn off. Feelings must be expressed to to separate from them.
- De-roling allows players to express these residual feelings. If they are not given a chance to express them, the feelings may surface during the postplay discussion, where they interfere with learning.
  - Even worse, they may surface quite inappropriately in some real-life setting.

For many role-plays, the de-role process is unnecessary because few feelings will surface.

- The instructor must watch very carefully to assess the presence of feelings and the need for de-roling.
- Even after completion of a de-roling process, the feelings will sometimes reassert themselves during the discussion, so be ready to perform supplementary de-roling as necessary.

Let’s Look at a HS Marketing Ed Role Play from Oregon


Writing your Case Studies and Role-Plays

- I encourage you to go to Chapter 15 of your text and read what it says about writing your own case studies and role-plays.
  - It has some nice step by step directions.

Combining the Case Study and the Role-Play

- A problem with long case studies is that some learners can become bored. You can use the case study as a role-play.
- Hand out the case study a few days before the session so that the learners can assimilate the information. Give them specific roles and ask them to develop the characters.
  - They will need to have a little time to do this.
- When each learner is ready, the usual steps of conducting, de-roling, and debriefing can be followed.

The Role-Play Lesson Plan . . .
Summary

• We looked at two more advanced trainer-centered instructional methods:
  – Case Study
  – Role Play

Other similar methods include:
  Action maze
  Exercises
  Incident process
  In-basket exercises

• These processes may be used as more advanced forms of the Theory Method.
  • They allow more learner participation.
  • The instructor must have (and use) good observation, evaluation, discussion, and feedback skills.
  • The final discussion is where much of the learning takes place.
  • These methods require more specialized planning to develop the case and role-play materials.
  • These are popular methods and can be very effective.

Try them in your instruction.

Assignment

• Next week
  – Computer-Based Learning
  – Read Chapter 16

• You should begin to write your first and second choice lesson plans for your Portfolio.