

CASE TEACHING ONLINE GUIDE

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ONLINE TERMS OF ART

Online or Remote: This umbrella term refers to instruction that occurs by way of internet rather than in-person instruction in a bricks-and-mortar classroom.

Online teaching can be **Synchronous**, where students and instructor join together at a set time via videoconference. Or it can be **asynchronous**, where sequenced learning materials allow a student to move through a lesson independently. Online teaching can also be a blend of the two.

When case teaching converts from in-person to synchronous class sessions, some of the content, once delivered in a physical classroom, may be delivered through asynchronous materials. It is not only possible to adapt case teaching to this new synchronous/asynchronous blend—if done thoughtfully, it can be just as effective as traditional case teaching.

Hybrid: The hybrid approach combines in person and online learning. This can take place in different ways. Perhaps a large class meets in remote synchronous sessions, but smaller sections of the class meet in person. Perhaps the students and instructor alternate between meeting in person and joining one another remotely. Or perhaps the instructor simultaneously teaches one group in person and another group remotely.

1 | OVERVIEW

This guide provides practical tips and tools for case teaching online. Whether you are just getting started with case teaching or are an experienced case teacher, this guide is designed to help you use the power of case teaching in the online environment.

TOPICS

Synchronous Case Teaching



Find tips and tools on everything from getting started to managing an online case discussion, using polling and much more.



Asynchronous Case Teaching

Find practical tips and resources on how to use and structure various asynchronous materials in online case teaching.



Incorporating Audiovisual Case Materials Online

Tools and resources for leveraging audio, video, and multimedia case materials to invigorate your case line-up.

CASE TEACHING

² | ESSENTIALS

Traditional case teaching conjures up an image of an active classroom: students engaged in lively debate over the ins and outs of a given case story. But, even in a conventional in-person class, the less visible heart of case teaching is the set of learning objectives you want the students to understand by way of their collective analysis of the case. Perhaps you want them to discover new principles, practice tools and skills, or apply theoretical concepts to analyze the dilemmas of the case. The necessary starting point is rigorous preparation. Students must begin with a close reading and analysis of the case. Through carefully chosen questions and exercises, you then guide students to discover the lessons of the case, ideally through discussion—in person, online, or in written form, via discussion boards or collaborative projects.





3 CREATING AN ONLINE LEARNING COMMUNITY

One of the biggest challenges for an instructor in a synchronous class is to establish a lively, comfortable class camaraderie. This is important in any class, but crucial for case teaching.



Take time early on in your course for student introductions. For example:

- ♦ Ask students to write 100-150 words about themselves and include any photo they like.
- ♦ Ask students to reveal something others might be surprised to know about them.
- ♦ Invite students to discuss what they hope to get out of the course and how it fits into their broader goals and interests.
- ♦ Ask to meet individually with each student outside of class at the start of the course so that you have a firmer sense of who is "in the room."



Invite students with a relevant perspective on a case topic to comment during class discussion. This can help students to feel "seen"—and can also allow students to know more about one other.



Look into, or near, the camera while talking. The students will feel as though you are making the effort to talk directly to them.



Encourage students to turn on their camera if possible, recognizing that some students have limited connectivity or are dealing with other mitigating circumstances and might need to turn the camera off at certain points.



Show up to your synchronous class a few minutes early in order to engage in casual conversation with students as they arrive. Likewise, stay after class to allow students to ask follow-up questions and socialize with their peers.

GENERATE ENTHUSIASM

- ♦ Select cases that will be inherently compelling.
- ♦ Look for opportunities to inject humor.
- Some case teachers recommend teaching standing up rather than sitting down. It's easier to be lively when you're able to move freely, gesture, and show nonverbal enthusiasm.



In a large class, it is difficult to keep track of all the students within the video conference itself. Your view might shift depending on recent activity and who is speaking. Consider keeping a printout of all students in the class next to you for reference.



Consider community-building ideas that raise the energy before case discussions. For example, ask students to contribute song ideas for a class "playlis," to be played at the start of class. Or play music specific to the country/location the case is set in.



Consider starting the class with a show of hands/Chat comments about how students are thinking or feeling about something in their lives, in the news, or about the case they just read.



ESTABLISHING EXPECTATIONS

The case method—with its reliance on high quality discussion—suffers in the absence of student preparation. It is crucial that students read the case closely, and—ideally—more than once. But how to establish this norm? And how to make sure students prepare effectively, focusing on the aspects of the case germane to your learning goals? Ideas below.

BRIEF PRE-CLASS RESPONSES

Consider asking students to respond to 2 to 3 questions about the case before class. These responses can be brief, for example 200-300 words. If possible, ask students to enter their comments on a class discussion board, so they can engage with one another's ideas.

- Take time to craft compelling questions. Students will quickly weary of questions simply aimed at making sure they did the reading. Provocative questions or those that draw a division of opinion from the class will provide an engaging launch for the case discussion.
- Use these responses to sharpen an upcoming case discussion. Reading pre-class responses has several advantages:
 - ♦ You will go into class with a better understanding of what students do and do not "get" about the topic/case and will be able to focus your class time accordingly.
 - ♦ You will have a natural way to break the ice during the discussion, referencing certain comments and tacitly rewarding students with particularly thoughtful or unusual responses.
 - You can also invite some students to repeat or expand on their ideas in the discussion. This practice especially supports students who are otherwise reluctant to request/compete for a chance to speak.

MANAGING THE DISCUSSION



ESTABLISHING RULES OF ENGAGEMENT -

It is a good idea to establish rules of engagement upfront. An orderly approach is necessary not only to reduce the audio chaos of multiple speakers, but to allow you to remain in charge of the conversation and to ensure that a range of views is surfaced.

See the following pages for tips and tools on effectively managing online case-based discussions.

Sample norms of engagement:

- ♦ Discussion should be respectful at all times.
- ♦ Class must be a safe space for expressing varied opinions.
- ♦ Interruptions should be avoided.
- ♦ Students should follow agreed upon norms (such as hand-raising) when they want to speak and mute their microphones except when speaking.



ENSURING EQUITY

Consider tracking student participation, with an eye to making equity adjustments and to ensure that over time, all students get an equal chance to participate.



USING VISUAL SIGNALS

You might need to create an additional set of rules to support more spontaneous peer-to-peer interactions. For instance, what if a student wants to respond to a comment just made by a classmate, before the moment passes? In such a situation, you could ask students to raise both hands on camera. Or, if your videoconference includes reaction symbols, you might designate one symbol to signify "respond to a comment just made."



MANAGING PASSIONATE DISCUSSION

If discussion becomes heated, you may need to step in immediately to reassert the rules. For example, you might say, "I know that passions run high on this topic, but I'm going to stop you there and ask you to either rephrase or pass the baton. A reminder that everyone in this class is to be treated with respect..." You could also address infractions after class, in a private message.



GETTING THE MOST OUT OF YOUR ONLINE CASE DISCUSSION



REIMAGINE DISCUSSION BLOCKS OR "PASTURES"

Just as in an in-person case discussion, you will want to think carefully about what questions to pose to the class. Typically, working backward from the learning goals for the session, you will want to limit yourself to 2 to 4 topic areas, discussion blocks or "pastures." Within each pasture, you may ask questions, stage role-plays, set up debates, conduct polls, send students into small groups for discussion or other activities. In an online class, variety, surprise, compelling content, and active assignments with deliverables will help hold your students' interest.



"CHUNK" THE DISCUSSION

One of the general recommendations for online classes is to "chunk" the material you are presenting—that is, divide it into discrete, tightly focused units of 10 to 20 minutes. In that regard, most case-based classes—divided into 2 to 4 discussion pastures—are already well-suited for online teaching. Making a special point to mark the beginning and end of each discussion pasture may help to underscore the structure of the session. You may want to provide (or solicit from students) a mini-wrap after each discussion pasture.



ENERGIZE PEER-TO-PEER INTERACTION

In an online case-discussion peer-to-peer interactions might require more intentional facilitation. Consider using a simple relay technique to foster spontaneous peer-to-peer conversations. Begin with a question and identify the first student to respond. After responding, the first student in turn calls on a second student to carry the discussion forward. The second student has to respond to the statement made by the first student in one of three ways: a) I agree and, b) I agree but, or c) I disagree because, and call on the next student and so on.



THE ALL-IMPORTANT WRAP

Online or in-person, you will want to end with a "wrap" that ties the discussion together and underscores the generalizable lessons from the case. When teaching cases online: consider ending your session by inviting students to type into the Chat feature their key takeaways, and things they are left wondering about.



An issue that inevitably comes up for any instructor: What to do about the fact that some students volunteer to speak often, while others rarely volunteer to do so. An online case-based class can exacerbate this problem, as students can find it easier to avoid being called on or turn off their cameras. Some teachers like to "cold call" in a traditional class (calling on students without warning, which motivates them to come to class prepared), and continue to do so successfully online. Another approach is to make "warm calls" (either asking a student ahead of time if you can call on them to address a particular question—or warning them that you plan to do so).

Warm calls pair nicely with another student preparation technique: students making pre-class responses which you preview before discussion. You may notice, for instance, that two students have opposing viewpoints, and could tap each of them for a "warm call" to share their divergent thoughts.

Employ warm calls when a particular student has a background or expertise relevant to the case study.



Consider using warm calls as a way to ensure there are equitable opportunities to participate in class that do not rely on students to assert a wish to speak. Where possible, teaching assistants can help keep track of student participation and note any patterns.

MAKING THE MOST OF BREAKOUT ROOMS

Breakout rooms offer a chance for small groups of students to engage in conversation, deliberation and collaboration. Tips on making the most of breakout rooms follow:



For case discussion, groups of 4 to 6 students are generally recommended—large enough to include a range of views but small enough for all students in the group to make a meaningful contribution. If you are using Zoom, settings allow you to send students to breakout rooms without requiring that they "accept."



Breakout group activity can be relatively quick (5 minutes) or it can be longer (10-20 minutes), allowing students to collaborate on a focused group task. You might ask students to analyze an aspect of the case using a chart or table. Or, depending on the issues raised in the case, you might ask them to make a difficult choice, come up with a persuasive argument, or outline a strategy.



Whatever the task, it is important that the breakout activity is clear. Anecdotal evidence suggests that students sometimes spend breakout time trying to figure out what they are supposed to do. Consider giving students instructions in writing as well as verbally, for example, by posting them in the Chat feature. You can also provide each group with a shared slide or document (e.g. Google Slides) to work on together, with instructions included at the top. See page 17 for more.

PERSISTENT GROUPS

There are advantages to "persistent groups" in which the same students meet in small groups for a portion of the course. By meeting together over several case sessions, they become familiar and comfortable with one another. It will be useful to create names or numbers for these groups. The downside to this arrangement is that the chemistry of some groups may be better than others. Thus, you may want to periodically assign students to breakout activity with others that share a common interest, for example, or randomly assign students to different groups for each case-based session.



Groups should also understand what they are expected to produce/deliver when the breakout session ends and the class reunites in plenary. For example, you might ask each group to assign a spokesperson who can, if called upon, report group conclusions. You may also ask each group to "turn in" its chart, worksheet, etc.



You will probably want to call on a few groups to report out to the full class, but, especially in a large class, it is best not to ask every group to report back every time, as the content is likely to be repetitive. If each group turns in a "deliverable" of some kind, your students will be unlikely to feel they've labored in vain even if not called to report-out.



You will probably want to call on a few groups to report out to the full class, but, especially in a large class, it is perhaps better not to ask every group to report back every time, if the content of the responses is likely to be repetitive. If each group turns in a "deliverable," your students will be unlikely to feel they've labored in vain even if not called to report-out.

LEVERAGING SHARED SLIDES

Breakout groups can be enhanced by various kinds of tools and collaborative software, which are especially helpful in facilitating group assignments. Shared slides or documents (for example, Google Slides) can help students feel like they are all working on the same well-defined task or deliverable through collaborative viewing, writing, and brainstorming. If using a collaborative slide-based software, see suggestions below.

- A slide to display initial instructions for the breakout group activity, laying out what you want participants to do. A clear task, deliverable, and specified timeframe helps ensure they are using their time productively.
- A template slide that groups can use. Tables usually work well to guide students on how much you expect them to write. This slide could also include the group number or name, and places for members to designate their role, if applicable (i.e., timekeeper, facilitator). Each group will have a slide to fill out within the larger document, the link for which you can share through the Zoom chat.
- An added plus: you can monitor the slides as groups write on their designated slide and can identify which group(s) to call on to participate once the class reconvenes for discussion. In this way, not only are the slides visible products of group work and learning, but also the basis to conduct a discussion that is both effective and inclusive.





Consider dropping in on the different groups to see how they are faring. Students should also understand how to use the "ask for help" button, assuming that feature is available through your videoconferencing service.



If a countdown clock is included in the videoconferencing service, it can be useful to set one up in each group, so they do not lose track of time. If your videoconferencing service does not have such a feature or you choose not to use it, it may be useful to recommend that someone in the breakout group be assigned the role of timekeeper.



Send broadcast messages out to all the groups to indicate remaining time. These typically appear only briefly, so they should be short (for example, "we'll be finishing up and returning to class in three minutes" and "returning in 60 seconds").

THE ONLINE BLACKBOARRD

If you have traditionally used a black board, slide projector, or electronic tablet during your in-person case sessions, there are online teaching tools that allow you to do much the same thing on-screen, by sharing slides, documents, and stylus technologies. Which tool you choose will largely depend on whether you prefer annotating by hand or by typing. Considerations for making your choice are summarized in the following tables, adapted from Teaching Effectively with Zoom, a book by Dan Levy, Senior Lecturer in Public Policy at HKS as well as the work of lan Tosh and Kristin Sullivan at HKS.



ANNOTATING BY HAND

TOOLS/STRATEGIES		ADVANTAGES		CHALLENGES	COST
Writing on a physical blackboard, whiteboard, or	♦♦	Straightforward to use Low learning curve	♦	Requires physical space	\$
flipchart located behind you	♦	Low cost	♦	Must write legibly	
Writing on a sheet of paper on your desk and	\	Flexible. Use a blank, printed page or slide to annotate	♦	Need writing surface/space	
capturing output using a document camera or smartphone	♦	Can use pen to write, highlight quickly and easily (compared to formatting typed font)	♦	USB document camera can be expensive	\$\$
Writing on a tablet with	♦	Can project anything on tablet (slides, PDFs)	♦	Higher learning curve	
stylus	♦	Benefit of modern presentation software and flexibility to handwrite	\$	Tablet can be expensive	\$\$\$

ANNOTATING BY TYPING

TOOLS	ADVANTAGES	CHALLENGES
Zoom's native whiteboard feature	 No materials/technology needed other than Zoom 	♦ Medium-high learning curve
	 Both instructor and students can add notes at the same 	Can only draw using keyboard and mouse
	time	♦ Can get unwieldy if more than a few students are
Typing on a		contributing
document on your	♦ Low learning curve	♦ Might need to sometimes
computer (e.g., presentation software like Microsoft PowerPoint or Google Slides)	 Flexible: Can type notes into a blank document or prepare a template to fill in (structured note-taking) 	stop/pause screen sharing so emphasis is on gallery of students in Zoom

HOW TO USE CHAT

Most video platforms have an optional "Chat" feature, allowing you, your teaching assistants (TAs), and your students to make brief written comments to one another or the entire class. Some instructors disable the Chat feature, while others leave it on/off, or turn it on/off intermittently. While Chat is on you could use it to several good advantages.

- Chat allows you to hear from an unlimited number of students on a given topic. This can nicely complement a discussion block in which only a few students will be able to speak in the time allotted.
- If you or your TAs monitor Chat comments, you may be able to draw attention to comments that are especially interesting or germane to the case or learning goals. In some instances, you may want to ask a student to expand on their Chat remark in the discussion.
- You can also directly ask students to use Chat to answer certain questions. Or, you can use it informally; in the interval before class, for example, you might ask students to share something they did over the weekend via Chat.
- It gives you, your teaching assistants, and students the chance to share relevant links to materials that have arisen in the discussion, without disrupting the flow.
- It allows all participants to address administrative questions or technical issues--again, without disrupting the discussion.

HOW TO USE POLLS

Some videoconferencing services include a polling feature which is extremely useful in kicking off, or wrapping up, a discussion topic.



Polling allows you to inject a note of suspense at the beginning of a discussion by posing a provocative question. Such questions are generally interesting to students—do they stand with the majority or minority? and will help you to gauge your students' understanding of the material.



Poll results can give you a good sense of where students are with the material, which can help you steer the discussion more effectively. Consider following the poll with a low-stakes conversation starter: "Would someone who answered "yes" volunteer to explain their thinking?"



For faculty using cases to teach quantitative methods, in particular, polling offers a quick and powerful measure of how well students are able to apply theoretical concepts in real-life contexts.



If poll results show your class is very split, students might benefit from a small group discussion or class-wide discussion/ debate.



If you anticipate that, as a result of the small group or class discussion, students might change their mind on the polling questions, consider doing a before and after poll.



POLLING IN ZOOM

If Zoom is your videoconference tool, the platform includes a simple multiple choice polling option. Although there are several polling applications that offer more capabilities than Zoom, they may raise challenges. Using them alongside Zoom or other videoconferencing services requires students to visit an external site to answer the poll. The downside of an external polling app is that it adds yet another technology for students to juggle, on top of managing multiple windows.

CASE TEACHING ESSENTIALS

4 | ASYNCHRONOUS CASE TEACHING

Asynchronous teaching materials are carefully chosen and sequenced to allow students to move independently through lessons in a course. But the role of asynchronous teaching varies from course to course.

Blending Synchronous + Asynchronous

Some online courses include a blend of live, synchronous sessions and asynchronous materials. This requires careful consideration of which aspects of the case lesson particularly lend themselves to discussion, and which might benefit from individual or offline work.

Asynchronous + Small Group Some online courses include no synchronous sessions with an instructor. They are essentially all asynchronous, but some of them enroll students in cohorts with the expectation that students will meet together in small groups for online discussion via videoconference.

Asynchronous Only

Still other online courses have no synchronous sessions or small group discussions. Students move through the asynchronous materials entirely independently. For case teaching, this format poses a challenge. But, with careful preparation, it is still possible to teach cases in such classes.

ADAPTING TO ASYNCHRONOUS

If you are adapting an in-person class to a blended or an asynchronous online class, how do you approach case teaching, which is traditionally a "live" discussion-based model? Ideas below.



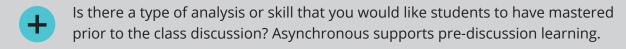
Scrutinizing your in-person class plans, to decide which pieces of your case teaching to shift to asynchronous instruction, can be a valuable exercise. For example, more upfront analysis of certain aspects of the case, done asynchronously, may lead to a better-informed and better-prepared live discussion.

Similarly, in an asynchronous/small group model, some aspects of case-based learning can be done as independent work, and some aspects can be done as small group work in line with broader learning goals.

A few ideas are listed below to help you decide which parts of your case teaching plan to shift to asynchronous instruction, in which individual students or small groups can take on learning activities.



Are you using the case to introduce complex concepts or frameworks? Asynchronous allows self-pacing. Your students may prefer the chance to learn this material independently. Some students may find the lessons relatively easy and move through the material quickly. Others may find the lessons more difficult and appreciate the chance to move at their own pace.







Would an asynchronous approach allow students to pursue aspects of a case lesson that are more personally relevant to themselves?

CASE ANALYSIS COMPANION

At HKS, a learning design team has created a simple, customizable template called a "Case Analysis Companion," which can scaffold students in the preliminary asynchronous analysis of the case. A Case Analysis Companion can be assigned with other synchronous and asynchronous learning activities. Click here for link to editable template.

Case Analysis Companion: Case Title					
Name (First, Last)					
Date					
Assignment Description Instructor provides an overview, placing the case in the context of the class session and the course as a whole and identifying the broad learning task.					
Part I. Topic or Umbrella Que	estion?				
Instructor adds in additional information or terminology needed to complete the exercise that maps to Pasture 1. Instructor follows this with specific questions or tasks. If the task is to respond to one or more short-answer questions, a space is included for student comment on each question, as below.					
First Question?					
Type here					
Second Question?					
Type here					
Part II. Topic or Umbrella Question?					
Instructor adds in additional information or terminology needed to complete the exercise that maps to Pasture 2. Instructor follows this with specific questions or tasks. If the task is to populate a table or chart, a blank version of the table is included, as below.					
	Variable A	Variable B			
Situation 1					
Situation 2					

DON'T FORGET THE WRAP!

Whether case teaching synchronously or asynchronously, it is important to consolidate and underscore the generalizable lessons from your case instruction. In person or synchronously, you might make a brief set of remarks during the last few minutes of class. In an asynchronous setting, the wrap can take several forms, for example:

- You might give students a handout that identifies the lessons.
- ♦ You might video record your wrap or narrate a slide show that does so.
- You might record a podcast-style conversation with a colleague, subject-matter expert or an individual featured in the case to underscore the main points.



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INCORPORATING AUDIOVISUAL CASE MATERIALS ONLINE

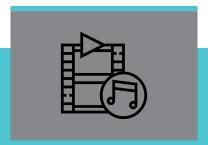
Audio, video, and multimedia curriculum materials can invigorate your online case teaching and enhance asynchronous learning. Whether you teach frequently with cases or not, the HKS Case Program media collection offers many options to add variety to your course and give your students an immersive learning experience. The collection features three types of media-based curricular materials, but the tips in this section apply to media-based teaching tools in general.

VIDEO SUPPLEMENTS + VIDEO CASES



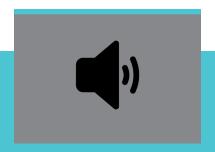
Short video supplements meant to enrich written cases and stand-alone video documentaries, where the story is told entirely through video.

MULTIMEDIA CASES



Multimedia cases where video, text and infographics are interwoven to tell the full story.

PODCAST SUPPLEMENTS+ AUDIO CASES



Podcast-style conversations meant to enrich written cases and narrated audio versions of written cases.

The modular nature of audiovisual case materials makes them easy to incorporate into a wide variety of synchronous, blended and asynchronous case needs.

FOR SYNCHRONOUS AND BLENDED TEACHING

- Short video and audio supplements, can be played in the context of a synchronous case class to either launch or frame a discussion, motivate a specific topic, or provide a transition from one "pasture" to another.
- You might assign students the first few chapters of a multimedia case for asynchronous learning and use videos later in class to highlight specific moments or aspects of the story. You may also choose to replay snippets of certain videos students have already watched in order to emphasize certain concepts or junctures.
- Some video can serve as "reveals" that provide the answer to a case dilemma, or the status of an unresolved element of the story in the case. These are typically played at the end of a case-based session.

FOR ASYNCHRONOUS TEACHING

- When assigning videos or multimedia cases for asynchronous learning, the instructor may want to structure the learning by asking students to answer a few questions about strategies or insights described in the case (ideally, by way of the class discussion board), or to reflect in writing on certain aspects of the story.
- Videos can sometimes be perceived by students as optional or less rigorous than written materials. Consider including guidance or questions that will prompt students to closely analyze the video content during their asynchronous work.
- In order to make analysis and retention easier, our multimedia cases include a PDF version with transcripts of all the videos.

PODCASTS

Podcasts have become increasingly popular among students and instructors alike. When offered as part of an online case package, students can listen away from their computer screen, a feature that has grown in appeal during the Covid-19 pandemic. You might consider using an existing podcast in lieu of an additional reading. You might also consider recording your own podcast. For example, you might stage a conversation or debate with a colleague who has an interesting perspective on the case topic. These conversations or debates have the potential to generate more buy-in among students by bringing their professor's voice into the mix.

CREATING A SIMPLE PODCAST ON ZOOM

If you're interested in recording a short conversation between yourself and a colleague or subject matter expert about a case, recording it on Zoom may be relatively simple. To ensure a good conversation and good-quality audio capture:

- Narrow the scope of the conversation in advance (i.e., don't try to discuss the case in its entirety).
- ♦ This will enable you to keep podcast length manageable.
 We recommend 15-20 minutes, and ideally not more than 30 minutes.
- ♦ Before you start the meeting, make sure both you and the interviewee are using USB mics or headphones. Both of you will have to select your microphone on Zoom, by going to: Settings / Audio / Microphone and clicking on the dropdown menu, where you can select the right audio input.

