Teaching note formats – Is there an optimal balance?

Linnea Czarnecki

*The International Marketing Programme*

*Halmstad University, Sweden*

**Abstract**

**Purpose** – The purpose of this paper is to examine the appearance of case teaching notes and to determine if there is an optimal format or structure.

**Design/methodology/approach** – Literature review with discussion, including two tables for comparison.

**Findings** – Synopsis, Teaching Objectives, Teaching Plan, Analysis and References are the five components that should be included in a teaching note in order to achieve the optimal balance.

**Research limitations/implications** - The conclusions in this paper have been limited due to the subjectivity of teaching note formats. The sample of teaching notes presented has also been limited due to the inaccessibility of teaching notes.

**Originality/value** – By highlighting the key components of a teaching note, this paper advances understanding of the ideal format and the purpose of each component.

**Keywords** Case studies, case note outline, teaching notes, teaching note format

**Paper type** Viewpoint

1. **Introduction**

A case can generally be described as a written account of a real life situation that individuals may have confronted (Baxter & Jack, 2008). Cases may include the facts of a complex situation, the attitudes, beliefs, and the prejudices of the individuals included, and how these factors have influenced their actions (Kember, Ho & Hong, 2008). When studying a case, students will study and analyse all the available information presented, and not just read the general theories (Jones & Russell, 2008). By providing relevance to the learning environment through a realistic case analysis, students will become more motivated to learn (Kember, Ho & Hong, 2008).

Using the case method as a way of teaching was pioneered by the Harvard Business School, and is still a major element of their teaching program (Christensen, 1981). Barnes et al. (1994) states that just reading about principles and memorizing theories does very little to prepare the students to apply their knowledge to real life complexities. Discussion teaching through e.g. case studies will do better in achieving this objective, since it gives students the experience of applying knowledge to practice.
The use of case studies as a teaching tool has increased over the years, and is now a common and widely accepted pedagogical tool in universities (Strach & Everett, 2008). The focus in higher education has shifted from professor-centred learning to active student participation and involvement (Christensen, 1981).

2. Advantages of the case method
Learning through the case method assists the students with developing an understanding of how to relate theoretical notions from course literature to dilemmas of practice (Gravett et al., 2016). Students acquire practice in making decisions and learn how to carry them out in a manner that will obtain the approval of others (Lundberg, Rainsford, Shay, & Young, 2001). This way of learning allows students to think analytically and constructively in an organizational context and justify the solutions they come up with. Furthermore, the case method triggers students’ development of questioning, inquiry and analysis. During this process, students learn the translation of textbook knowledge to its application in real life problems (Leonard & Cook, 2010).

3. Teaching the case method
When teaching through the case method, the instructor takes the role of facilitator instead of the more common role as the expert. This allows the teaching format to be discussion based (Fallon, 1996). The success of any class discussion depends primarily on the skill and abilities of the discussion leader (Leonard & Cook, 2010). The case discussion normally begins with the instructor asking a student to briefly summarize the case study. Thereafter, carefully prepared questions are posed to help the students frame the central issues. Once the main facts have been outlined, the instructor guides the students towards answering the main questions included in the teaching notes. The instructor’s role in this phase of the class discussion is to connect various topics presented by the students and to link one another in order to pull together the students’ contributions. Within this context the formulations derived from the case study becomes the outcome of the whole class and not that of an individual student. Once the central points of the case are emphasized and analysed, the instructor can better facilitate the process of integrating theory with practice (Fallon, 1996). It is important that the instructor is cautious with voicing his or her own sentiments and conclusions at an early stage in analysis, since this may change his or her role from that of a participant to that of an authoritarian leader (Leonard & Cook, 2010).
4. Teaching notes

A teaching note is a very important part of a case study, since it acts as an instructor's manual, which describes teaching methods, relevant theories and typical answers. A teaching note should briefly summarize the facts of the case, highlight key issues, outline teaching objectives, suggest methods for teaching (e.g. discussion, homework or presentation), and emphasize themes and theories. Sometimes a teaching note will also include further reading and references for the instructor to find more information. The tradition of including a teaching note with a case study is long standing, and often required to accompany teaching cases that are submitted to case journals (Lundberg & Winn, 2005). Although the content and format of these notes to some extent have become quite standardized, the structure is highly dependent on the type of case, the field of study, the context of where the teaching note is presented and the author's goals and intentions (Naumes & Naumes, 2006).

4.1 The purpose of teaching notes

We typically think of teaching notes as an aid to the teacher of a case, but teaching notes actually have several uses. One usage is for teachers who are considering the case for their course to more easily determine if the case is suitable or not (Naumes & Naumes, 2006). Here the teaching note provides a simple way of assessing whether the case and the problems it raises fits the intended course or not (Clawson & Weatherford, 2008). The other more obvious usage for teaching notes is to serve as a teacher's manual for teachers who are preparing the case for class discussions, and a third is for the case author himself to synchronize the case with how it should be taught (Naumes & Naumes, 2006).

It is agreed upon by most case authors and teachers that the purpose of a teaching note is not to replace the individual preparation of the instructor. Teaching notes are created to increase the value of the case for teaching purposes in the classroom. They are not supposed to be a replacement for the comprehensive study of the case required of the instructor in order to get a thorough understanding. A teaching note can increase the instructor’s breadth and depth of thinking by adding the case author's analysis, ideas and purposes. They are intended to help the instructor provide the students with a small slice of the real world. A case does not tell the students what is significant theory, instead it describes a situation and lets the students discuss among each other, in order to figure out for themselves what the problems are and how to solve them. Each student’s approach may be different which will lead to new dialogues. The teaching note is a mean to broaden the instructor’s horizons and better prepare him or her to guide the students in order for them to get the most learning out of the particular case. It serves to jump-start the class and enable the instructor to teach the to the best of his or her abilities (Naumes & Naumes, 2006).
If a case study is not accompanied with the guidance of a teaching note, it could easily be used improperly, at the wrong time, in the wrong course or overlooking relevant theories or topics. Teaching notes provide the case instructor with questions, perspectives, and analyses that otherwise might have been forgotten (Lundberg & Winn, 2005).

4.2 Teaching note formats
Although there are no given rules for the format or structure of a teaching note, there are some commonalities of what they normally should include (Cinnéide, 1998). An outline for writing case teaching notes derived from the pioneer of case study writing, the Harvard Business School (Herreid, 2007), is presented in Table 1. Also presented are those elements required in a teaching note in order to be accepted for publication at The Case Centre (2016), what a good teaching note should include according to Clawson and Weatherford (2008), and Oikos (2013) guidance on what makes an excellent teaching note.

An assortment of what content is included in 10 different case teaching notes, including number of pages, is presented in Table 2.
### Table 1: Examples of Teaching Note Outlines

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<td>3. Major Issues</td>
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5. Discussion

In Table 1 it is observed that a good teaching note outline ranges from five to nine different components. This might seem as quite a large variance, but there are some major items that appear in each outline; synopsis, teaching objectives, teaching plan, analysis and references. These five commonalities were also seen to be the used in the majority of the teaching notes compared in Table 2.

5.1 Synopsis
The synopsis usually describes what the case is about, including the challenge or issue being faced and who the protagonist is. It may contain the introductory section of the case itself or key sentences from the first paragraph (Kane & Madden, 2014). The synopsis serves as an aide-memoir for the instructor (Roper & Millar, 1999).

Moreover, all of the teaching notes presented in Table 2 contained some sort of synopsis or case overview as well, which supports the importance of including this part in a teaching note.

5.2 Teaching objectives
This section should be as detailed and precise as possible since it describes what the students should be able to do after having discussed the case (El Ghazali & Abba, 2015). This section normally explains what knowledge, skills, applications of concepts the students are expected to learn after the class discussion (Kane & Madden, 2014). The number of objectives may vary depending on the scope of the issues (El Ghazali & Abba, 2015). The educational objectives may also vary depending on the environment within which the case is used. For example, a case study may address both organizational and technical issues; in a management course the former may be a priority, whereas in a course on record systems automation the latter may take precedence (Roper & Millar, 1999). Hence, this section is very important, since it helps the instructor determine if the objectives of the case fits the goals and objectives of the course (Herreid, 2007).

Furthermore, all of the teaching notes presented in Table 2 contained a section of teaching/ learning objectives, proving the significance of including this part.

5.3 Teaching plan
In this part, the case author explains how the case should be taught in a classroom, by giving explanations about the teaching phases, the work teams, the assignments regarding the case and perhaps the timetable of each session. The teaching plan is clearly linked to reinforcing the learning objectives of the case since it also clarifies the issues in the case study and gives a brief
description of the case discussion (El Ghazali & Abba, 2015). Moreover, it lists key questions to raise during class discussion accompanied with appropriate answers or discussion points (Roper & Millar, 1999).

All of the teaching notes presented in Table 2 contained some sort of teaching plan, classroom management or discussion questions.

5.4 Analysis
In the analysis part of the teaching note, the author maps out all the possible answers to each of the questions given in the case, and sorts them according to relevance (El Ghazali & Abba, 2015). Here the suggestion of relevant models, theories and other analytical tools are presented (Yue, 2012).

All but one teaching note in the Table 2 comparison included an analysis section, meaning that the majority of the sample uses this part in the format.

5.5 References
It is appreciated to include references for readers to follow up particular lines of thought or subjects mentioned (Herreid, 2007). It is important that the bibliographies are kept current, particularly if they relate to ever changing issues. Original documents from real situations may also be included in this part of the teaching note (Roper & Millar, 1999).

Out of the 10 teaching notes presented in the Table 2 sample, 70 % included a section with references or further reading, supporting this being an essential part.

5.6 Length of teaching notes
From Table 2 it can be seen that there is a relatively large variance regarding the amount of pages used in a teaching note. The teaching notes presented in the sample range from 3 to 12 pages with an overall average of 6,5 pages.

6. Conclusion
Since there is no given format to how a teaching note should be composed, the experts within the field proposed different extents of components to include in a teaching note outline. The four example outlines ranged from five to nine components, differing both in the amount and the complexity of description of the components. However, five major components could be noticed in all of the outlines in the table of comparison, suggesting that these are essential for the optimal balance.

1. Synopsis
2. Teaching objectives
The five components where also found in the majority of teaching notes presented in the Table 2 assortment, which supports the above conclusion. An optimal amount of pages in a teaching note is hard to conclude, since it depends very much on the nature of the case itself.

7. References


**Teaching Note References**


