DOCUMENT RESUME

ED 421 144 IR 018 864

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TITLE WeSaySo Case Study: Designing and Implementing a Case Study for Use in an Instructional Design Class.
PUB DATE 1998-00-00
NOTE 6p.; In: "SITE 98: Society for Information Technology & Teacher Education International Conference (9th, Washington, DC, March 10-14, 1998). Proceedings"; see IR 018 794. Figures are illegible.
PUB TYPE Reports - Descriptive (141) -- Speeches/Meeting Papers (150)
EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Case Studies; *Computer Mediated Communication; Computer Uses in Education; Cooperative Planning; Curriculum Development; Educational Technology; Graduate Study; Group Discussion; *Group Dynamics; Higher Education; *Instructional Design; Listservs; Needs Assessment; Teaching Methods; World Wide Web
IDENTIFIERS Web Sites

ABSTRACT

A case study was used in an instructional design class to facilitate the transfer of conceptual knowledge to concrete concerns and to aid instructional technology graduate students' understanding of the steps involved in designing, analyzing, and implementing an effective needs analysis. The case study involved real events at fictitious company (WeSaySo Oil and Gas); each team member took on the persona of one of the three employees or a training consultant. A World Wide Web site, e-mail, and a listserv were used to communicate the discussions of fictitious characters in the study; face-to-face brainstorming was conducted at the onset. The use of case studies has advantages and disadvantages. Several modes of learning were made available to the class, including role-playing, debate, game design, lecture and demonstration, individual and group research, and the online case study. The personalities, experiences, and goals of each team member were important to the successful completion of the project. Designing the case study was not an easy task, yet the time spent working through the issues of instructional design helped the team members to understand the steps of instructional design as well as the steps that go into designing curriculum as a team. (AEF)

WeSaySo Case Study: Designing and Implementing a Case Study for Use in an Instructional Design Class

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WeSaySo Case Study: Designing and Implementing a Case Study for Use in an Instructional Design Class

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Before the design process could begin it was imperative that the group set goals and define its own purpose for composing a case study. The group's intent was to write a case study to aid graduate students' understanding of the purposes and use of a needs analysis. Students were to use the case study to enhance their understanding of instructional design. Because the case study was for an IT class, it was decided that a web presence would be the best way to deliver the project. As a group, it was determined that a case study would provide the best medium to help students develop a better understanding of the steps involved in designing, analyzing and implementing an effective needs analysis. The case would involve real events at a fictitious company. The process of gaining insight into the characters and company would help facilitate the students' ability to process classroom lecture and text. It was thought that the case study would affirm the progress of the students as they formulated answers to given case materials. It was expected that active participation with the case study would create an extension of classroom learning.

It was envisioned that the students would combine classroom knowledge of their disciplines and connect this information with the subject of study: the fictional company *WeSaySo Oil and Gas*. This case study was designed to facilitate the transfer of conceptual knowledge to concrete concerns. The use of the case scenario was designed to provide the student with an opportunity to become a constructive problem solver.

Basic Components

The case study was facilitated through a web site, e-mail and a listserv; however, the web site was the primary information source. The listserv and e-mail were used primarily to communicate the discussions of fictitious characters in the case study. Additionally, students were encouraged to join in discussions with the characters. Each team member in the case study took on a persona, so there were three employees of WeSaySo and one training consultant.

The web page consisted of six primary web pages with secondary pages linked to the *Case Study* page. The *Welcome* page and the *Why a Case Study* page were designed to give the instructional design student more information about the rationale for a case study and how to use the WeSaySo case study (screen capture 1).

The primary source of information for the case study was found in the biographical information about the individual characters. Work history, education and other pieces of information helped to define the case study environment (screen capture 2). Additionally, performance appraisals and sound clips helped to add further definition to the environment (screen capture 3).

Once the students were acquainted with the characters, company and problems, the listserv was used to facilitate discussion between the training consultant and employees. An interview process was used to gather information for the need's analysis. Students in the instructional design class were invited to join the discussion (screen capture 4).

After allowing ample time for discussion, the need's analysis went up; this was followed by further discussion, and a final product went up two weeks later (screen capture 5).

In addition to the actual case study, a link page provided other sources of case studies, a timetable page provided a summary of weekly input and progress of the case study, and a contributors page gave information about the participants.

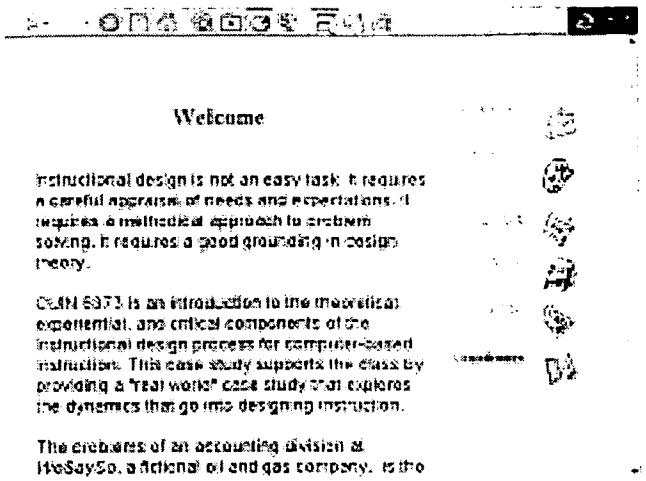

Figure 1: Information Page.

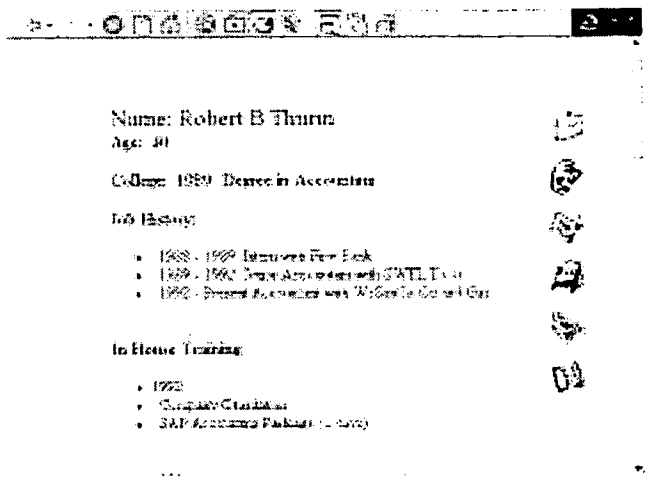

Figure 2: Employee's Work History.

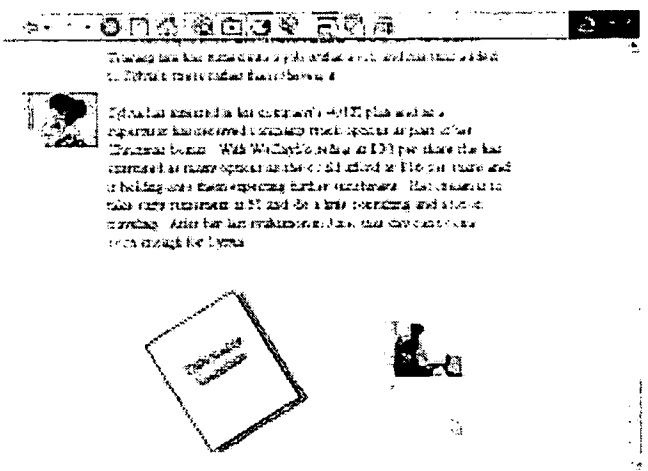

Figure 3: Employee's Work History.

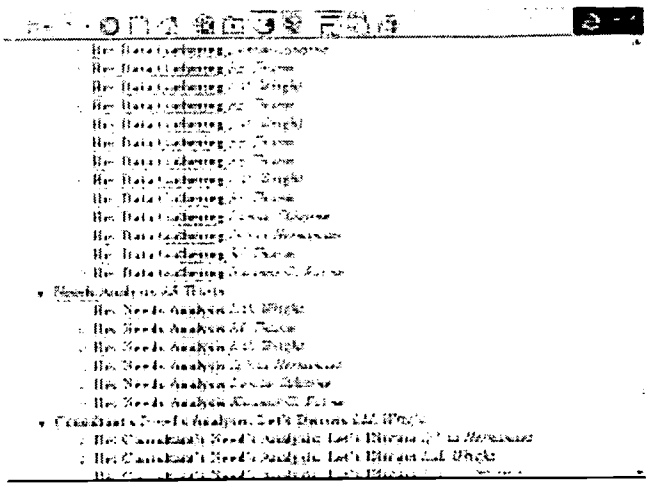

Figure 4: Class List Serv.

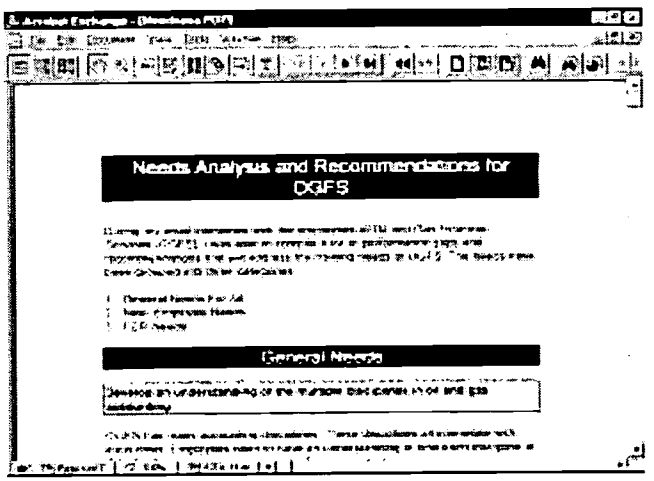

Figure 5: Final Need's Analysis.

Group Dynamics

The four members of the case study preparation group are pursuing masters degrees in Instructional Technology at the University of Houston. We were able to share our classroom learning, unique talents, and work experiences on the project. The combination of our formal learning and work experiences enabled us to develop a fictional case study based on real-life for instructional design.

To facilitate this project we needed to establish parameters for communication. We decided to meet face to face as needed to brainstorm ideas and deliverables as well as discuss our roles and responsibilities to the team. To supplement these meetings we chose to use e-mail as our mode for information and data sharing.

With any group communication can become a problem. For example, e-mail service is unpredictable and information may be misinterpreted. Overall our group was able to take communication mishaps in stride and continue working together to accomplish our goal.

At the initial meeting we were debriefed individually about the case study project. No clear objectives were established, resulting in part of the learning process becoming the creation of learning objectives. At times the group became frustrated. We did not know where to start, what was expected of us, how the final product was to be used, and what was the scope of the project. The scope of the endeavor was overwhelming at the start, yet we were also excited about the opportunity to display our instructional design competencies, develop new competencies and share our experiences with fellow students.

In the early meetings we brainstormed ideas about what was to be accomplished and developed a plan of action. The first concept was to develop two case studies: a business model and an educational model. Two case studies would enable the project to appeal to all the learners in the classroom and demonstrate differences in the instructional design process. We developed individual roles and responsibilities and set out to gather information to share about the case studies. Our initial plan was to take the students through the development of a needs analysis for a business model and continue with the development of a finished product in an educational setting.

Midway through the project some team-member's enthusiasm for the project began to wane. Other factors such as work, school, and personal obstacles intruded on the project. There was also a renewed sense of frustration in trying to complete what had become a broader undertaking than we had first conceived. As a group, we decided to revisit our original vision and modify it to fit the students' needs and our own time constraints. The new vision was to follow through the whole instructional design process using the business model. With our new vision in mind, we set off to accomplish the task with increased excitement.

As the project drew to a close, we discussed housekeeping tasks that needed to be accomplished. These responsibilities included student and instructor evaluations of the project, assessment of the web page, appraisal of the use of the listserv, release of the final deliverables, discussion of what worked well with the project and how could it be improved in the future.

For all of us this was the first time we worked in a group framework that extended over a long period of time. Most of us were familiar with working in a single group for short projects but never over a sixteen week course with everyone depending on each other to accomplish the tasks. There were some communication breakdowns, misinformation, and technology problems encountered throughout the process. However, as group we worked through these and it made us stronger. We all feel that next time we work in a group that will extended over a long period of time we will be better group members.

Benefits to the Class

Using one or more case studies in the curriculum design class has advantages and disadvantages. Several modes of learning were made available to the class, including role-playing, debate, game design, lecture and demonstration, individual and group research, and the online case study. As one of several methods of instruction, the case study could become an important part of the course.

The case study addressed here was a business model involving an accounting department, a situation with which most students in this class would normally be unfamiliar. The advantage of using an unknown circumstance is that this is a position in which a professional training consultant or course designer likely will find himself at some point. It also frees the class from digressing into a discussion of how things are done currently in their own schools or businesses and focuses the class attention on the problems at hand in the case study and how to solve them.

A case study with the writers of the study available for online discussions has exciting possibilities for being a dynamic instructional instrument. Student interaction with the "characters" of the case can increase student interest, allow deeper understanding of curriculum elements, and cause the case study to be different every time it is used. The characters can engage the students in debate, discussion, and allow student comments to alter outcomes. The disadvantages of the use of case studies revolve around the same issues as the advantages. An unfamiliar situation may cause students to have decreased interest in the project due to lack of appeal of the application. If the case does not directly affect a student's particular situation, current or desired, he may have little motivation to examine the ramifications of the case. The online discussion and interactivity with the characters causes the case to have to be developed in "real time" with the class, leading to deadlines being unmet and frustration on the part of the class itself, as well as those working on the case study.

As the curriculum design course is intended as preparation for employment in some kind of training capacity, the use of case studies, both real and fictional, are important parts of the course. A selection of cases already prepared and "in the can," so to speak, may be a solution to the disadvantages enumerated above. The course instructor could select an appropriate case study for a class, and have a group of students who have previously taken the course assume the roles of the characters online. Continued use of case studies will define and refine its role as part of the curriculum design course.

What the Team Learned

In designing a case study it is easier to construct a situation about something which the authors have explicit knowledge and awareness. However, the team agreed that

the instructional design class would benefit more from a study that was distinctly different from their comfort zone of the classroom. The team chose a business model hoping that it would challenge the instructional design class to think outside their world the classroom. However, this decision created additional problems that had not been anticipated.

First, the team had a difficult time constructing a real-world study because it was dealing with accounting concepts within a business model. The model for the case study was an oil and gas company with problems in an accounting department. It was very difficult to construct the case study so that the model was real and credible. The team simply did not have an awareness of the business to make it "feel real." The team enlisted the services of an accountant to help with some of the details; this helped some. A case study can be written about a situation that is foreign to its authors and users; however, it takes extra research into the situation and an awareness that the situation will need to be even more rigorously researched and developed. In the case study of *WeSaySo* memos, dialogues, charts and even a company prospectus could have been used to make *WeSaySo* more realistic. The biographies, sound bites, and performance appraisals that were developed helped to create the context for the case study, but more could have been done.

The team soon came to an awareness that the personalities, experiences, and goals of each team-member were important to the successful completion of the project. The opportunities and challenges of working as a self-directed team helped each of the team members to grow in an understanding of the dynamics of cooperative learning. The members also came to a better understanding of what it is like to be part of a project-team. One team member remarked at the end of the project that this was the first experience that she had ever had in being part of a team.

As part of this team-effort, the four students came to understand that each individual was on the project for different reasons. Different reasons imply different levels of commitment to certain components of the project. These different levels of commitment resulted in a perceived inequity in the sharing of the workload. The four team members discussed this perception of inequity and agreed that the most important result was that the job got done in a professional manner while allowing all members to make a significant contribution. The four members agreed at the project's completion that this was accomplished. However, the team also agreed that many of the problems could have been precluded with better pre-planning and clearer member guidelines.

More lucid guidelines and better planning could mean several things. First, a more formal time schedule with strict rules for adherence should have been considered. Individual goals and team goals could have been discussed and agreed to. Personal contracts between the team members could have been written. Consequences for failing to meet deadlines could have been implemented. Several things could have been done to establish the parameters of personal and group conduct, but it is uncertain that they would have been effective. Because the class was only a three-hour class, and because each student had different personal goals and responsibilities, it may have been difficult to get a group consensus as to what to expect. It would have been even more difficult to enforce the guidelines. Nevertheless, the group still agreed that some form of accountability should have been built into the project plan.

Designing the case study was not an easy task, yet the time spent working through the issues of instructional design helped the team-members to understand the steps of instructional design as well as the steps that go into designing curriculum as a team.

Acknowledgements

Kathleen Heaps, CPA: assisted with information on accounting procedures. Dr. Sarah McNeil, Assistant Professor in Instructional Technology: helped the team to focus on the case study and guided us whenever the need arose.

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