

Supplementary Essay

Employing the Case Study Method in the Teaching of Automated Records and Techniques to Archivists

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Abstract: The purpose of this article is threefold. First, the author briefly introduces the concept of case study methods in teaching and the ways these methods might be applied in the professional development of archivists. Second, this article explores case study writing and reports on what the Society of American Archivists (SAA) in particular is doing to promote the creation of case study materials. Third, this essay identifies areas in which archival educators and practitioners might team up to produce case studies concerning the archival administration of electronic records and the use of information technologies in archives. Since the author has no intention of restating in the confines of this short paper the vast body of literature pertaining to case writing and teaching, he has also provided a selected bibliography of useful texts and articles.

About the author: Richard M. Kesner is cochair of the SAA Committee on Automated Records and Techniques, and an established author, consultant, and archival educator. In his capacity as Chief Information Officer at Babson College, a leading U.S. institution of business management education, Kesner has employed and written case studies in conjunction with his courses on information resource management. He has also assisted in the establishment of the "European Case Clearing House at Babson College," the North American arm of the European Case Clearing House at Cranfield (UK), which produces and distributes member institution case study materials worldwide.

WITH THE ESTABLISHMENT OF THE Academy of Certified Archivists and a wide range of committees and agencies looking into the training and development of archives professionals, the Society of American Archivists (SAA) has initiated an evaluation of what constitutes an archival education. Indeed, the Society's recently drafted strategic plan speaks to preparing its members for the information resource management challenges of the twenty-first century. This same concern prompted the SAA Committee on Automated Records and Techniques (CART) to approach the National Historical Publications and Records Commission (NHPRC) for funding to develop learning objectives and curricular models addressing the archival administration of electronic records and the use of information technologies in archives.

The special edition of the *American Archivist* in which this article is included serves as the final report on the outcome of that NHPRC-funded study. It also includes essays on the direction of archival education in the areas of automated records and techniques. During the course of the discussions that culminated in these materials, both archival educators and subject-field specialists agreed that case studies might prove useful in broadening the profession's training processes.¹ However, it was also noted that archivists do not at present have access to a body of case studies that might be employed for either class teaching or personal

self-development. Furthermore, the profession lacks the mechanisms, incentives, and perhaps even the expertise to create cases and associated learning tools.

What Is a Case Study?

In making this statement, I want to distinguish between what I would call "scenarios" or "institutional reports" and true case studies. The archival literature abounds with personal accounts and collective surveys of the activities of archival institutions. This body of works has and will continue to play a useful role in illustrating successful archival practices and in stimulating comparisons among various archives programs. By contrast, case studies are pedagogical tools, expressly designed for the training and professional development of those who use them.² Although most case studies are based on actual experiences and hard facts, they are not presented as tightly structured narratives. Rather, the typical case study articulates a particular problem, relates the facts associated with that problem, introduces the views and comments of those directly involved, and attaches a variety of supporting documentation, such as budgets, financial statements, organizational charts, technical data, and so forth to the finished product.

In brief, a case study frames a particular set of circumstances and what the organization intends to do in response to that situation. More often than not, the case reflects

¹The members of the NHPRC-funded automated records and techniques curriculum study team included Tom Brown, Frank G. Burke, Richard Cox, Anne Diffendal, Luciana Duranti, Terry Eastwood, Sue Gavrel, Carolyn Geda, Bonnie Hardwick, Margaret Hedstrom, James Henderson, Jane Kenamore, Richard M. Kesner, Linda Matthews, Michael L. Miller, Jim O'Toole, Nancy Sahli, Lee Stout, Ken Thibodeau, Vicki Walch, Bill Wallach, and Lisa Weber. Various members of this team met in Washington, D.C., in March 1991 and then in Chicago in November of that same year to develop the concepts and tools presented in this special edition of the *American Archivist*.

²C. Roland Christensen, *Teaching and the Case Method* (Boston: Harvard Business School, 1987): 9–49; C. Roland Christensen, David A. Garvin, and Ann Sweet, eds., *Education for Judgment: The Artistry of Discussion Leadership* (Boston: Harvard Business School, 1991): 153–74; M. T. Copeland, "The Case Method of Instruction," in *And Mark an Era: The Story of the Harvard Business School* (Boston: Little Brown, 1958); and Alfred G. Edge and Denis R. Coleman, *The Guide to Case Analysis and Reporting* (Honolulu, Hawaii: Systems Logistics, Inc., 1978): 1–8.

the complexities of the local environment, the options faced by those in decision-making roles, and the potential outcomes. It concludes without a clear resolution of the problem. The student is placed in the middle and asked to sort out the conflicting views and possibilities and to recommend a solution to the problem faced by the organization. In so doing, the student confronts a "real-world" experience, filled with ambiguity and clouded with uncertainties. For the would-be manager, perhaps nothing short of an internship can convey the complexities of an actual work experience as effectively as the study and discussion of a well-written case.

From the student's point of view, the case study method provides a number of important action-oriented skills. It differs markedly from more traditional text- or research-based learning experiences. While the student may begin by reading a case study, the real learning takes place in the preparation of an analysis and in the presentation of one's own observations to the class. It is quite common for students to prepare and present cases as teams rather than as individuals. This, too, simulates the real workplace, wherein group or more formal committee efforts are quite common.

In preparing cases, students are obliged to think clearly in addressing complex, ambiguous situations and to devise reasonable, consistent, creative, actionable responses. They will find it necessary to draw on skills learned elsewhere for both quantitative and qualitative analysis of the data. Since most cases purposely contain both necessary and extraneous information, they will need to determine what is important and what is missing. To present their findings, they must work effectively in groups, prepare oral arguments, and compose clear, forceful, and convincing papers. Last, but certainly not least, they will need to invest part of themselves, their own

values and ideas, into the framing of their analysis and recommendations.³

Without taking anything away from other modes of teaching, there is no question that the case study method works. It has been employed in the teaching of law for generations. However, it is the application of case studies in the teaching of management and business administration that has most relevance to archivists. Clearly, the substantive focus of these two disciplines may be viewed as quite different, but the generic skills required by managers are very much the same. For example, archives training programs, like business schools, teach their students to operate within complex organizations, manage vast quantities of information, address the needs of diverse groups of "customers," manage human and financial resources, and so forth. Business schools have employed the case method since the 1950s.⁴ Archival educators can learn from their example.

However, to exploit the advantages of the case study method, archivists must have a useful body of cases to draw from as well as a system to renew this resource. Since case materials serve as a key element in many business school courses, such mechanisms already exist for both the authoring and distribution of case studies within most business school programs. Indeed, leading

³Edge and Coleman, *Guide to Case Analysis and Reporting*, 19–20. See also Helen Kelly, "Case Method Training: What Is It, How It Works," *Training* 20 (February 1983): 46–49; P. R. Lawrence, "The Preparation of Case Material," Harvard Business School Case No. 9-451-006 (Boston: HBS Publishing Division, 1953); and Robert Ronstadt, *The Art of Case Analysis: A Guide to the Diagnosis of Business Situations*, 2nd ed., (Dover, Mass.: Lord Publishing, 1980).

⁴P. Hunt, "The Case Method of Instruction," *Harvard Educational Review* 21 (Fall 1951): 2–19; M. P. McNair, "Tough-Mindedness and the Case Method," *Harvard Business School Case No. 9-379-090* (Boston: HBS Publishing Division, 1954); and Greta K. Nagel, "Case Method: Its Potential for Training Administrators," *NASSP Bulletin* 75 (December 1991): 37–43.

business schools, such as Babson, Harvard, and Darden, have turned these activities into self-supporting enterprises. The U.S. market for case studies already exceeds six million cases per year. College and university programs as well as private businesses and government agencies purchase case packets in large quantities.⁵

If archivists are to benefit from the case study method, the profession must devise ways to encourage the writing of case studies and their use in training. The SAA has in fact taken some steps to address this need as will be reported on below. But to succeed, the method must be embraced by archival educators—both those who teach practitioners just entering the profession and those involved with continuing education programs. With that in mind, this essay will next consider the case study method in more detail.

The Case Study Method

Each case study is unique in that it is derived from a particular context and set of circumstances. Though for reasons of confidentiality a case author may choose to disguise his or her subject, almost all cases are based on real-life situations. They have an institutional focus and typically begin by introducing the reader to a problem or opportunity faced by the organization. The author next provides more general background information about the institution, its

primary activities (businesses), and those participants who feature in the case.

Following these introductory elements, the reader usually finds a more detailed analysis of the problem, as well as a consideration of the options that the organization might employ to address the situation. To embellish this section of the study, the author often employs quotes from key players as well as informational exhibits, such as financial statements, budgets, organizational charts, and technical specifications. The author then provides a status report on how the organization plans to deal with (or is currently dealing with) the problem. Here, too, quotes from the actual players in the drama may be employed. The case concludes with a series of exhibits and attachments. The document itself runs no more than twenty to thirty pages in length.⁶

Most case studies are accompanied by a “teaching note” or instructor’s guide. This document tends to be briefer than the case itself and is designed by the author to assist the instructor in navigating the class through the study. The teaching note typically begins with a summary of the case and the educational objectives behind its creation. It then moves into a class discussion outline that provides alternative strategies for leading the class. Many authors also include a summary analysis of the business problem and its institutional context, as well as a discussion of all case exhibits and attachments. Most important, the teaching note should provide the instructor a set of questions for use in class that draw out the case’s main learning objectives. In concluding, the note may also provide a list of additional readings, a glossary of specialized terms,

⁵Harvard’s Case Services enterprise is perhaps the best known worldwide. For its part, Babson College has teamed up with the European Case Clearing House to distribute business cases globally. But even smaller programs, such as Simmons College (known for its School of Library and Information Science) have case publishing and distribution programs of their own. See Paul H. Tedesco, *Teaching with Case Studies* (Boston: Federal Reserve Bank of Boston, 1974); and Robert K. Yin, *Case Study Research: Design and Methods* (Newbury Park, Calif.: Sage Publications, 1989).

⁶Lawrence Kingsley, “The Case Method as a Form of Communication,” *Journal of Business Communication* 19 (Spring 1982): 39–50; Lawrence, “The Preparation of Case Material”; Yin, *Case Study Research*.

and recommendations for follow-up class assignments.

In preparing a case for class, the instructor must review the case in detail. The availability of a teaching note will greatly assist in this process. The instructor must decide on a strategy for the class session itself. For example, if key questions have been circulated to the class in advance, the instructor may choose to work through these questions. In employing this approach, many faculty members structure the questions around an outline of the case's key facets. They may then direct discussion to focus on aspects of the case that are particularly significant.⁷ Alternatively, the instructor may choose to leave the initial raising of questions and the analysis solely to the students, artfully directing their inquiries through Socratic discussion. Still another approach involves role playing by members of the class. Particular cases may lend themselves to one approach over another. More often than not, the instructor selects a classroom strategy to vary the pace and keep the students on their toes.

For the student, the case study method experience will in all probability include both individual and team work. At the out-

set, each student must read the case with care, sift through the information, determine what is relevant to the analysis, and organize a holistic picture of the organization depicted in the case.⁸ During this review process, the student must identify the problem, assess the organization's capabilities for dealing with it, identify alternative scenarios for problem resolution, evaluate each alternative and select the best of the lot, and develop a workable solution based on the chosen alternative. This is a large order for the student and thus a strong argument in favor of relatively short, highly focused case studies. If the case is too long or complex, the student will not have sufficient time to wade through all of the data on the way to developing a solution.

A team approach to case study analysis affords the student with perhaps the best way of preparing case materials. Each team member brings his or her own work experiences and personal perspective to the discussion. The students benefit from the cross-fertilization of ideas and also from the experience of fighting for their individual points of view. As in a real-world situation, the team must agree on a single solution to the problem they face and a strategy for its implementation. In so doing, the students necessarily bring to bear analytical and communicative tools learned elsewhere, as well as information resources that are external to the case study itself. For example, a team faced with the prospect of introducing an optical-imaging system into a corporate records management program might do research on the imaging industry to better understand their technology options.

⁷Since most case studies provide a view into an organization, they may be employed to focus on different dimensions of the same problem. For example, a case that considers the impact of a new information technology on a particular institution could be analyzed from the standpoint of project management (i.e., How was the new technology acquired and installed?), organization (i.e., How did the institution restructure itself in response to the new technology?), or human resources (i.e., How were staffing and employee training programs altered in light of the new technology?). It is therefore important for the instructor to provide the class with a focus for their analysis, often through the provision of key questions for the students to employ as they analyze the case. See Ram Charan, "Classroom Techniques in Teaching by the Case Method," *Academy of Management Review* 1 (July 1976): 116-23; Christensen, *Teaching and the Case Method*, 125-210; and Benson P. Shapiro, "Hints for Case Teaching," *Harvard Business School Case No. 9-585-012* (Boston: HBS Publishing Division, 1985).

⁸Diane J. Garsombke and Thomas W. Garsombke, *Strategic Case Analysis: A Systematic Approach for Students in Business and Management* (Dubuque, Iowa: Kendall/Hall, 1987); Edge and Coleman, *The Guide to Case Analysis and Reporting*; and Michiel R. Leenders and James A. Erskine, *Case Research: The Case Writing Process* (London, Canada: Research and Publications Division, School of Business Administration, University of Western Ontario, 1978).

Again, as in the real world, the team is given a deadline to produce their analysis, typically one week from the assignment of the case. They deliver their analysis and recommendations to the class as a whole and face the questioning of both the instructor and their peers. In addition, they are required to provide a written report that details their solution and the requirements for its implementation. When working with a well-written case, students learn a great deal about the institution and its problem(s) as featured in the materials. They also benefit from the intense interactive nature of the case study method process itself.

As a complement to more traditional text-based materials and direct field experiences, the student of archival administration can benefit from the case study method. The current focus of most professional development programs addresses the tried and true needs of the archivist in such areas as collection accessioning, arrangement, and description. Little attention is given to management issues. It is arguable that case studies provide the best avenue for the growth of archivists as managers of processes, resources, and people. Similarly, a field experience may prepare a trainee for archival work in only one type of institution and fail to prepare him or her for effective performance in a different type of organization. Case studies cannot replace hands-on experience, but they can introduce students to unfamiliar work settings and problems. These simulated experiences will provide students with a distinct advantage when they confront a similar set of circumstances on the job.

Archivists who are interested enough in the discipline of case writing and teaching to give it a try, may be somewhat disappointed by the lack of case studies and associated learning opportunities within the archival community. Some library schools and all business schools could provide exposure to the *method* but not in the form of cases focused on the archivist's profes-

sional concerns. However, as the next section of this essay suggests, this state of affairs is already changing.

Creating Case Studies as Tools in the Training of Archivists

Over the past few years, the National Historical Publications and Records Commission has funded two major undertakings in the area of automated records and techniques (ART) as these relate to archival administration. The first brought together a recognized team of experts to define the archival profession's national agenda concerning electronic records. Among its many accomplishments, this group identified research and educational priorities for archivists. Shortly thereafter, the NHPRC funded a similar effort but one focusing on the development of ART-related learning objectives and core educational requirements. Its primary focus was to establish guidelines for archival educators, professional associations, standards committees, and individual practitioners, who would in turn develop customized responses to these challenges.

The electronic records group has already reported and the curriculum development group's report appears as the core of this special issue of the *American Archivist*.⁹ In both instances, they identify a myriad of needs and opportunities, including the strategy of employing case studies to address ART issues. SAA's Committee on Automated Records and Techniques (CART) has subsequently moved forward on two separate fronts to address the need to do something about case studies. On the one hand, they have prepared a preconference workshop to be offered prior to the SAA annual meeting in New Orleans on the writ-

⁹National Historical Publications and Records Commission, *Research Issues in Electronic Records: Report of the Working Meeting* (St. Paul, Minn.: Minnesota Historical Society for the NHPRC, 1991).

ing and teaching of case studies. On the other hand (and in conjunction with the SAA Office), they have begun efforts to obtain financial support for case authoring.

Richard Kesner and Jim O'Toole taught the first of a series of workshops that combine both exposure to case study teaching and case writing. Based on the experiences of the instructors and the feedback of workshop participants, CART will further develop the workshop for subsequent SAA meetings. Two distinct programs could very well emerge: One focused on instruction and addressed to archival educators and the other focused on research and writing and addressed to the needs of potential authors. Alternatively, archival educators who work in proximity to business schools may have access to faculty-based workshops on the case study method offered by those institutions. Although these programs will not expressly address the substantive issues near and dear to the archivist, they will assist in the development of more generic management and case study method skills.

Unfortunately, sufficient training in and of itself will not result in the creation of case studies. Business schools subsidize the efforts of those who author cases. Furthermore, they treat the publication of case studies as important accomplishments when making tenure decisions. The role of case studies in the tenure decisions of archival educators is a decision that must be made institutionally. Funding of the research, writing, and distribution process could also take place within the institution. This occurs within business schools, but in that instance the revenues generated by case study sales self-fund the investment. Certainly at the outset, archivists will need a pool of "seed" money from which to draw.

With this in mind, the SAA has approached the National Historical Publications and Records Commission for funding for a three-year case study authoring fund. If approved, the fund will finance the research for ten case studies and subsidize

their publication. By the release of this publication, the fate of that grant opportunity will be known. If successful, the SAA will publicize the availability of resources through the workshop and other venues. In addition, CART will work with the Educators' Roundtable and other SAA bodies to generate interest in case writing within the profession.

Automated Records and Techniques as a Focus for Case Studies

This concluding section focuses on the writing of case studies, with particular attention to opportunities for those involved with or interested in electronic records and automated techniques in archives. I have chosen this focus for two reasons. First, perhaps no subject area within the field of archival administration requires more attention. The rapid changes in information technology and their impact on short- and long-term information management are tremendous. Few archivists have direct experience with these issues and even fewer archival texts seem to refer to them.¹⁰ Case studies afford a means to fill this void efficiently and effectively.

Furthermore, the case study method is particularly well suited to the types of problems faced by archivists coping with automated records and techniques. The issues associated with electronic records accessioning, preservation, and description, for example, are similar regardless of the institutional context. The same may not be said of other aspects of archival activity. Many of the most vexing problems in the deployment of information technologies in archives have less to do with archival

¹⁰See Richard M. Kesner, *Automation for Archivists and Records Managers: Planning and Implementation Strategies* (Chicago: American Library Association, 1984); and its sequel, Richard M. Kesner, *Information Systems: A Strategic Approach to Planning and Implementation* (Chicago: American Library Association, 1988).

administration than with project and resource management, staff training and development, and organizational dynamics. These challenges are best conveyed through the give and take of case study discussions, especially because a nascent archivist rarely experiences such issues first hand.

More specifically, most of the management problems arising from the administration of electronic data archives would lend themselves to case studies. The national archives of the United States and Canada, and such private organizations as the Inter-University Consortium for Political and Social Research, possess a wealth of experience in the following functions of machine-readable records management:

- acquisitions and collection development
- collection description
- collection preservation
- reference services and research support
- facility design
- the funding and administration of electronic records programs
- the technological implications of managing an electronic records program

A case study on any one of these themes would prove useful indeed. In each instance, the reader would gain insights into how a particular agency manages its machine-readable records. The focus of the case—be it preservation or user services—will force the student to consider the options of current practices and their operational implications.

Similarly, case writers might choose to focus their inquiries on the impact of information technologies in redefining the role of the archivist within his or her parent organization. They might also consider how information technologies can best be deployed to improve the performance of the archival enterprise. For example, case studies concerning the effect of the follow-

ing technologies on the information resource management (IRM) of the organization would prove most useful:

- voice and data networks
- electronic mail
- imaging systems
- optical storage systems
- groupwork and groupware
- electronic and video conferencing

Any organization, no matter its size, has felt the impact of, or is planning for, these and other information technology products. Once implemented, they will have an immediate influence on the types of records workers will create, reference, and ultimately archive. The profession as a whole needs a better understanding of these developments and better preparation for using them. The case study need not expressly address the implications of a new information technology on archives. Rather it can examine and raise questions about the organizational and IRM changes wrought by the new technology. Confronted with this view, students could employ the case study as the basis for a discussion of what archivists must do in anticipation of these developments.

To author case studies like those mentioned in this article will require a team approach. An archival educator, motivated by the need for training tools and research opportunities, will join forces with an archival practitioner, who needs to understand one of his or her own problems or opportunities better. The educator brings to this alliance a knowledge of the audience and of what is required to create an effective case study. The practitioner provides the subject and serves as the liaison between the research team and the institution. Other technical specialists and fellow archivists might contribute additional support as external experts and manuscript reviewers. The host institution must give its blessing to the effort at the outset and, in so doing, must encourage cooperation between

the rest of the organization and the study team. Most institutions will also ask to review the manuscript before its release, and they may ask for anonymity.

Once the case study is approved for release, the authors will want to test it in the classroom to determine if the case materials achieved their educational objectives and if the style and content of the case hinders the learning process. Only after students have worked with the case will the team be in a position to address these issues and prepare an effective teaching note. Over time, the case itself may require further revisions in light of new developments or it may need to be replaced by more relevant examples. As the case study method itself attracts the attention of more archival educators, these individuals will build their own libraries of case studies similar to those maintained by their colleagues in business schools.

The professional development and learning opportunities afforded by the case study method are substantial. This essay merely suggests how and why archivists should undertake such an effort. As the SAA proceeds with its programs to promote and fund case study writing and teaching, archival educators and practitioners will more readily embrace the process and the tools it generates to assist the profession in the realization of its strategic objectives.

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