

Assessing Student Learning and Skills Using the Case Study Method

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The case study has proven its longevity in presenting students with learning challenges as they presented with an organisational situation to address in the class room. The case study encourages students to develop a number of practical and abstract skills that are applicable in the workplace. It can also be utilised in study teams which offer learning support for the team members. Further, with some adaptation, it is possible to convert the traditional case study into a real time case study using computer technology, thus making the case study reflective of the real world of employment relations and business.

The case study method has been shown to be successful in facilitating students' learning, critical thinking, understanding, and problem-solving in a changing environment (Bell and von Lanzener, 2000; Gopinath, 2004; Kunselman and Johnson, 2004; Stonham, 1995; Theroux and Kilbane, 2004). This is despite criticism by the Dean of the London Business School, Professor Laura Tyson, who recommended "an end to the reliance of case studies in favour of virtual decision-making experiences that reflect the real world of business" (The Australian, 15 September, 2004: 23).

It is possible to reflect the real world of business and employment relations by designing case study-based assessment that encourages students to consider the changing environment and the implications of their decisions with regard to other parties in the case study scenario. In other words, each decision made by a student will impact upon the decisions and behaviour of the other students in a study team (Gross Davis, 1993). This would then reflect authentic activities that mirror the experiences of real world practitioners (Bennett, Harper and Hedberg, 2002). If the case study is run over a longer period of time or in phases during the semester, the case scenario can change over time, providing an historical context and meaning for the students which will enable

them to deal effectively with the changes and to respond accordingly (Bell and von Lanzener, 2000; Petersen and Govindarajulu, 2003). It will also promote critical thinking and reflection which, according to Lundquist (1999) are essential parts of attaining new knowledge. This emphasis on contemplative thought is a valuable counterpart to the employment-related skills (Walker and Finney, 1999) which are also developed through case studies.

The case study under discussion involved students taking a role in an industry and employment relations scenario from 1992-2004. It was divided into two parts and was carried out in study teams of four with each student selecting and fulfilling a role – trade union, company, employer association, Federal Government. The role remained the same for the duration of the case study. Each student's performance was assessed both individually and as part of the study team (Gross Davis, 1993), with the emphasis being on the individual component.

The pedagogical underpinnings and the theoretical framework, the design decisions, and the implementation of the assessment case study in a graduate employment relations subject are described in this article. It suggests ways of adapting the case study for online

interactive assessment as a real-time case (Bell and von Lanzanauer, 2000; O'Reilly, 2003; Theroux and Kilbane, 2004), including further opportunity to apply simulation and modelling of decision-making (Mitchell, 2004; Williams, 2003).

Revisiting the Case study Method

The case study method is an approach that implements active learning strategies for students based on a description of a situation or context in which a problem or set of issues arises (Bonama, 1989; Grant, 1997). It promotes the ability to develop a reasoned response to circumstances and can be used to encourage critical and strategic thinking as well as developing more practical skills in communication and formatting and presentation of responses to the case.

The case study method requires “students to actively participate in real or hypothetical situations, reflecting the kind of experiences naturally encountered in the discipline under study” (Ertmer and Russell, 1995: 24; quoted in Bennett et al. 2002: 2). In doing so, students develop practical skills that are readily transferable to the workplace. The case study can be drawn or synthesised from real life (Bennett et al., 2002) or it may be hypothetical. The latter means that it is developed from a compilation of facts and knowledge to provide an illustrative example that fits the academic content and specific learning objectives of a subject (Barnes, Christensen and Hansen, 1994; Stonham, 1995; Wasserman, 1994). The former are drawn from factual data and provide a snapshot of an organisation or industry (Theroux and Kilbane, 2004). From a case study, students can obtain a clear contextual picture of the relationships and experiences of the parties in the case (Bonama, 1989). This is a key purpose in the case study discussed in this paper.

Case study Structure

The case study under discussion focused on enterprise bargaining and was synthesised from information about two separate companies in the Australian meat export industry, namely G & K O'Connor,

Pakenham, Victoria, which provides the situational factors for Part A (early 1990s) and Consolidated Meat Group (CMG), Lakes Creek, Rockhampton, Queensland, which provided the focus of Part B (2000s). The case study was geographically located at Lakes Creek for both parts. The juxtaposition of companies was possible because the legal framework applied was that derived from the federal industrial relations legislation. The role of the government in the case study also derived from the Federal Government's role in the Australian industrial relations system.

The justification for the choice of these companies lay in the fact that Part A provided an introduction to the move from a centralised award and wages fixing system to an enterprise focus where bargaining occurs. Further, G & K O'Connor's initial enterprise bargaining agreement negotiated with the Australasian Meat Industry Employees' Union in 1992 was recognised under the Federal Labor Government's best practice program for enterprise bargaining. The choice of CMG for part B was made on the basis that enterprise bargaining does not always achieve the outcome desired by the negotiating parties. The CMG example saw a return to the Federal award system followed by a cycle of plant shutdowns, re-openings, and then the plant closure followed by a company merger and re-opening under new work arrangements. The combining of the two companies fits with recommendations made by Wasserman (1994) that using events which have occurred and modifying them will result in a synthesised case study that retains the authenticity of real life while being interesting and engaging for students.

As two companies are synthesised in the case study, a pseudonym, 'Pacific Pastoral', drawn from the Shane Maloney novel, *Stiff*, was utilised. Students were provided with details about the original companies for their own research purposes (Bennett et al., 2002) but in accordance with Kunselman and Johnson's (2004) findings, they initially relied on the materials and guidance provided with the case study. Therefore, learning support

materials were provided to the students and were specific to the two parts of the case study. These included academic readings on enterprise bargaining for both periods and research on the industry and on the role of the parties in the industry and in general. The first set of readings, including Briggs (2001), Curtain (1992), DEVETIR (1994), Ludeke and Swebeck (1992), Murphy (1993), and Short, Preston, and Peetz (1993), focused on the introduction of enterprise bargaining and its potential. The second set of readings, including Burgess and Macdonald (2003), Loundes, Tseng, and Wooden (2003), Macdonald, Campbell, and Burgess (2001), and Nelson and Frith (2001), were both descriptive and evaluative of enterprise bargaining over the last decade.

There were also press releases, information presented as business memos and in the context of recorded telephone call transcripts. Information was presented this way to assist students with their own presentation format for their recommendations and because it strengthened the authenticity of the case by including dialogue and other such details (Wasserman, 1994; Bennett et al., 2002).

Guest speakers were used to provide specific industry and other background information. Students listened to the speakers and formulated questions for them based on the case study. Using the study team approach recommended by Gross Davis (1993), all members of the team read the learning support materials and considered the case study from the perspective of all four roles. Each student then selected a role in Part A (1990s) in which they became expert and which they completed for both parts of the case study. In this way, all study team members gained an insight into each role and the factors and issues that shaped the strategy to be recommended by each student for the particular role being played.

Introducing the Role Play

The role play aspect further strengthened the experiential and active learning for the students (Kreber, 2001; Richards,

Gorman, Scherer and Landel, 1995) and enabled them to apply theory learned earlier in the subject and their course to a practical situation (Argyris and Schon, 1977). Bennett et al. (2002) and Kunselman and Johnson (2004: 90) recommend that this reinforcing and integration of material and skills across subjects in a degree program is a "desirable situation" that is pedagogically sound.

The use of four member study teams to complete the two parts of the case study promoted interaction and collaboration between students as required by the case scenario and encouraged team members to support each other in completing the assessment phases (Rau and Heyl, 1990; Gross Davis, 1993). Gross Davis believes that the study team approach results in students developing their potential and capability to achieve higher results because they are more motivated (Mustoe and Croft, 1999; Sivan, Wong, Woon and Kember, 2000). The use of study teams and role playing also allowed students to assess the impact of their decision-making on other parties in the case study and to ascertain how the case study scenario developed and changed over time.

While students were able to compare the new situation presented in Part B with the previous experience of Part A and find matching characteristics or patterns (Riesback, 1996), they were not always able to apply the previous decisions, solutions, and recommendations for Part A to Part B. The external and internal environments presented for the parties had changed over the timeframe and the process and implementation of the recommended strategy for each party therefore correspondingly altered. This reflected real life relationships between the parties in the Australian meat processing and exporting industry between 1992 and 2004.

Strengthening the Teaching-Research Nexus

The relationship between teaching and research is of concern for tertiary instructors and administrators (Rowland, 1996). As Mullen (2000) states, the educators need to connect live research to teaching in such a way that students are engaged. The case study under discussion was drawn from the instructor's own industry research which encouraged and strengthened the link between teaching and research. This research was primarily of a qualitative nature and extended over several years, giving a rich depth and array of materials for inclusion in the case study.

Students were introduced to their instructor's area of research and were even able to participate in the research by providing different perspectives, raising additional questions, and testing data collection instruments. For example, in the case under discussion, a strategy profiling instrument utilised by students in the earlier stages of the semester was adapted by them for each case role. The original instrument, developed by Hax and Majluf (1991, 1996) for assessing content and process of business strategy, was adapted by the instructor in conjunction with the 2002 intake and used in an extensive research project on trade union strategy (for example, Jerrard, 2003).

Further, the instructor drew on personal resources for case materials and research network for guest speakers so industry practitioners could introduce students to the reality behind what they were studying in the classroom. A strong rapport between the instructor and guest speakers also encouraged students to be confident in asking questions of the guest speakers.

Rationale for using a Case study as assessment

The techniques of having each student select a particular role and of having the situation develop over time moved the case study into the real world of employment relations by specifically strengthening the authenticity of the materials and situation presented. The purpose of the assessment case study was formative in that it

encouraged students to deal with complex, significant, and perhaps recurring issues in an applied manner (Raju and Sanker, 1999). Over time, this built their skills and reinforced their understanding. The case study was therefore chosen as the final assessment piece for a number of reasons, ranging from enabling students to reinforce and apply knowledge gained during the semester through to developing the teaching-research nexus for the instructor.

The subject required students to develop an understanding of the key theories taught and applied in the strategic management of employment relations. It focused on 'big' issues and on problem-solving and creativity, rather than simply memorising facts and detail. This accorded with the recommendations of Grabinger (1996: 667; cited in Bennett et al., 2002) that "assessment must take more realistic and holistic forms" reflective of real world situations that the students may face in their professional lives (Raju and Sanker, 1999). There was a strong focus on students developing problem-solving skills, critical-reasoning, analytical skills, and collaborative skills (Bolton, 2000; Kunselman and Johnson, 2004) which they could then apply in the workplace (Beckman, 1990), thus making them better employees, managers, policy-makers or union officials.

The Raft Approach to the Case study

This case study assessment design followed the RAFT (Role, Audience, Format, Task) approach whereby the requirements of the assessment were clearly expressed to students to eliminate uncertainty about evaluation and grading. A case analysis must be graded for content and process (Gopinath, 2004). The former covers the student's understanding of issues and application of relevant theory and justification for the approach adopted in the case study. The latter includes presentation issues such as the use and quality of language, the structure of the response, the coherence and logic of the response that results from the task undertaken. In other words, the content is the task, the role, and the audience, while the process equates with format. Grading

rewards student accomplishment against the preset criteria developed from the learning objectives.

The learning objectives for the case study assessment included:

1. to improve critical and strategic thinking
2. to learn to think systematically about industrial and labour relations
3. to analyse the complex industrial and labour relations environment and subsequent changes between 1992 and 2004
4. to demonstrate an understanding of theory covered in the subject
5. to demonstrate understanding of concepts and theory covered in other prerequisite and related subjects
6. to understand the specific role being played in the case study
7. to demonstrate appropriate communication skills with other team members
8. to present material in a format appropriate to the role, the task, the audience

The task that students had to undertake was to develop a strategy, either independently or with their team members, that was most appropriate for the party they were role playing in the case. Therefore, the student's role in the assessment was that of the party they chose and their audience was the public and the industry, including the individuals who made up the party being role played; for example, in the case of the union, the audience included officials and members while in the case of the company, it also included the management team.

The task, or strategy, was to achieve the best outcome for the party and to be reflective of the party in reality, thus grounding the case study in project-based learning but with elements of problem-based learning apparent (Savin-Baden, 2003) because it is the process of arriving

at the end result that is also important. As the situation changes over time from Part A (early 1990s), the strategy of the party being role played changed and the students needed to build this change into their final recommended strategy for Part B (2000s). The development of the strategy, including the process used by each student and the content of the strategy (aims and objectives), for both parts of the case study then had a coherence and logic that reflected the case study data, situation, and party role as well as the theory studied earlier in the semester (Gopinath, 2004). The strategy profile instrument, originally developed by Hax and Majluf (1991, 1996) was completed by each student in Part B of the case study and was used by the instructor to assess the student's understanding of strategy theory and strategy content and process as it related to the student's selected role in the case.

The format in which students presented their recommendations for each party was open to each student to decide. While a list of academic and other references was required for each submission, the content could take any presentation format. The only proviso was that it had to be appropriate to the party being role played by the student. If not, it must be accepted academic format for a student research essay. When the former was adopted by the student, the recommendations were presented in a number of ways; for example, Ministerial media briefings and press releases were appropriate for the role of Government while a business report or exchange of internal memos was suitable for the role of company management. For the employer association and trade union, students chose from a range of options as diverse as press releases through to industrial campaigns, timelines and plans, and member information and updates reflective of those that would be placed on an actual association or union website.

The actual recommendations, as presented in each student's chosen format, and the processes used by the study teams needed to reflect an authentic picture of the party each student was representing (Bennett et

al., 2002). This required an understanding of the industry, the industrial relations system and law, the strategy process for each party, the role of each party, and the ideology of each party. For example, if the union was shown as working in partnership with the employer and surrendering independence and the right to industrial action as part of an overall strategy in bargaining and negotiation, the student needed to provide adequate justification for what appears to be contrary to the ideology and strategy to date of the Australasian Meat Industry Employees' Union.

Student Learning Outcomes: In their own words

Thirty-six students successfully completed the unit between 2002-2004. Written student feedback, where provided on subject and teaching evaluations regarding the assessment case study, has been positive and reflective of formative learning outcomes. Verbal and email feedback has also been positive and constructive. For example:

2002

I did this subject as an elective and have learned so much from my team members about collaboration and getting the best outcome for each party.

I learned a lot about the different perspectives in industrial relations. I think I now understand why unions behave in a certain way, especially those like the AMIEU. I might even consider working in a unionised industry now.

The assignment helped me to understand how my decisions as a manager affect others - even those not part of my company.

When I go home [to my own country], I will be working as a government official, so this case study has proven most valuable to me because I will probably be with the Department of Labour and the opportunity to look at the case from the government's perspective should prove useful for me in my work. I mean, all countries have governments, laws, and industrial relations.

The case study encouraged me to be creative – I got a chance to write press releases and this will help me in my job.

Until I did the role of the employer association, I thought they were boring and not very relevant any more but now I've changed my mind! They have a role to play in industrial relations and can shape the IR system quite significantly.

I had to "think" about things from a union perspective and this was a new experience for me as my workplace is non-unionised. I've learned a lot from this assignment about how unions operate and why they do things the way they do.

Overall, the case study was a good way to end the subject because everything came together. I could see the big picture and relate all the theories. Even the theory helped me to explain the processes behind what I chose to do in the case study.

2004

The case study let me apply the theory I learned in other strategy subjects and earlier in this subject.

The difference that a change in government can make became clearer to me after doing the case study. I watched the [Australian] election campaign with real interest this time 'round.

In role playing the union secretary, I found myself getting right into it, becoming quite militantmy newsletter looks like something from the union website Not bad for an HR manager!

In this subject, the case study was the best part because I could work with other people and learn from them as well as from lectures. It was quite fun in the end!

Enterprise bargaining is not all it is cracked up to be. The case study showed me that it is not just my company that is having problems, but that maybe they can be fixed.

I wouldn't like to be a union official ... my study group helped me with my strategy but in real life, I would have been on my own [except] with the rest of the union

people anyway. Maybe that is why I prefer the management side of things.....

It is acknowledged that the student feedback was of a qualitative nature and that not all students chose to complete the comments section on the evaluation forms or provide other forms of informal feedback. The comments above are those that related directly to the final assessment task, the case study. It appears, however, that the student comments match with the expected outcomes raised in the literature. Firstly, the assessment enabled students to successfully meet the objectives established for the case study and, in doing so, meet the evaluation criteria established from the objectives (Gopinath, 2004; Mitchell, 2004). Secondly, the case analysis allowed the students to go beyond the scope of the role they were playing and even beyond the scope of the case itself (Miller and Kantrov, 1998; also cited in Bennett et al., 2002) to offer both solutions to past situations and predictions for the future (Ogden, 1984; cited in Bennett et al., 2002). Thirdly, the case study allowed the students to be creative in the presentation of the material used for in each role response. This gave them the opportunity to develop writing and presentation skills suitable for the business world rather than just the academic environment. Lastly, the comments showed some personal reflection on the part of students as they increase their personal effectiveness (Peterson and Govindarajulu, 2003) as a result of the assessment activity.

The Next Step: Towards Real Time Case study

Using the real-time case method developed by Theroux and Kilbane (2004), computer-mediated communication technology could be used to develop the case study to run over the semester, rather than in only two phases. This would require the instructor collaborating with technical experts to develop the materials and place them on line.

New stimulus materials could be placed at least weekly on the site and virtual project rooms could be used for each study team

whereby the team members could respond to the new materials and changed situation and react to one another's suggested actions. The instructor would have access to the project rooms for monitoring and assessing each student's development in their selected role. There would be one project room for each study team and only team members and the lecturer would have access during the completion of the case study. In this way, the interaction and process of arriving at the recommended strategy for each party could also be assessed. For the meat industry, stimulus material could include changes in meat and livestock prices, health scares, new trade agreements, restricted livestock for slaughter (for example, during a drought), changes in the management team of a company, threatened take overs, new technology, union elections, inter-union rivalry for industry coverage, changes in government and legislation, changes in the role of an employer association or the association executive, and so on. A final version of the each student's recommendations from throughout the semester would then be posted for grading.

The use of a real-time case would meet the criticisms levelled at the traditional case study method by Professor Laura Tyson and would move case-based teaching and assessment to a new level of efficacy in delivering experiential learning for students (Theroux and Kilbane, 2004).

A final suggestion is to incorporate some structural modelling for decision-making. Students could model their decision-making over the semester using Event Structure Analysis (ESA) software as part of their final assessment. ESA is used to qualitatively model "logical structures that guide human action in concrete situations" (Heise 1989:140). Students could therefore examine the causal relationships between the decisions of each party with a view to predicting how the other parties in the case will react to a particular decision.

Conclusions

The case study, as currently used, relies on a study team environment for learning and builds skills in collaboration, communication, decision-making, and time management as well as encouraging an ability to cope with change and think strategically. These skills and abilities are amongst those which Professor Laura Tyson (2004) claims are in demand by employers. Although assessment is not usually thought of as an enjoyable process, the case study's team focus combined with room for individuality and creativity, has received favourable feedback from students regarding the process itself and their own learning outcomes. While the life of the assessment case study in its original form is limited, it is recognised that, with utilisation of computer mediated student interaction and the move towards online delivery and the real-time case method, the life of the case study can be extended using additional stimulus material that can be easily adjusted or altered each semester that the subject is offered.

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