

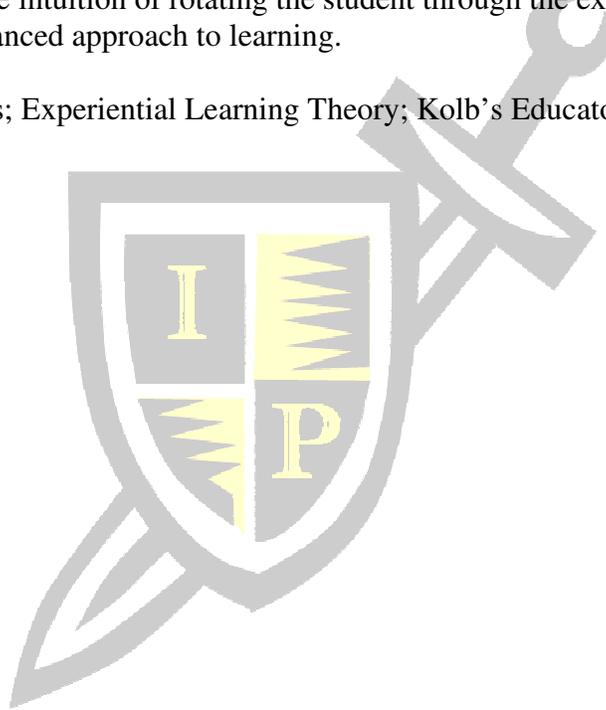
## Case Studies and Kolb's Educator Roles

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### Abstract

Not unlike other forms of experiential learning, case studies provide a compelling opportunity for individuals to apply their learning to real world challenges and decision-making. This paper's case study review is largely informed by Merriam, Yin, and Stake and the experiential learning educator role component by Kolb, each leading scholars in case studies and experiential learning theory, respectively. Because of similar learning processes and goals, this paper proposes to overlay Kolb's educator role construct on both the objectives of case study-based instruction and the intuition of rotating the student through the experiential learning theory cycle to provide an enhanced approach to learning.

Keywords: Case Studies; Experiential Learning Theory; Kolb's Educator Roles; Pedagogy



## INTRODUCTION TO CASE STUDIES

Case studies provide an experiential educational event for individuals to apply their learning to complex, real world scenarios. Columbia University's Center for Teaching and Learning (2021) suggests that "case method teaching is an active form of instruction that focuses on a case and involves students learning by doing" (Heath, 2015). Case studies can take a variety of forms, but most often a narrative of a particular challenge - an event, problem, situation, theoretical, or conceptual issue - is provided and students are asked to respond to that challenge by recalling classroom materials or their own lived experiences.

The case presents facts and data about a real or an invented organization. Students are asked to analyze the case by focusing on the most important data provided and use this information to determine the many challenges facing that entity. Students are subsequently asked to propose alternative courses of actions to deal with the challenges they uncover and finally, to recommend a solution. (Laudon & Laudon, Pearson, 2011; University of Winnipeg, 2021; Columbia CTL, 2021; Heath, 2015)

Case studies provide distinctive advantages for instructors, not the least of which is bringing the real world into the classroom. Golich, Boyer, Franko, & Lamy (2000), writing for a study funded by the Pew Foundation, add that educators use cases because they are:

Interesting and real; make course content relevant to students in an extraordinarily powerful way; demonstrate the application of, as well as the limitations of, concepts and theories; and compel students to take responsibility for their learning. (p.8)

### Case Study as an Addressable Story

Oftentimes, because there is no one simple definition, a case study could be best thought of as an addressable real world story. As such, case studies seek to accurately recreate real (or realistically invented) challenges to enable the learners to "experience the complexities, ambiguities, and uncertainties confronted by the original participants in the case". The authors continue that, "as they 'inhabit' a case, students must uncover or discern key components from the 'real messiness of contradictory and complicated information.'" (Golich et al., 2000, p.1)

As stories, case studies actively engage learners by opening the real world to complex discussions and decision-making by shifting through the data provided. In particular, when arriving at a recommendation, case studies oftentimes compel students to:

Distinguish pertinent from peripheral information; identify the problem(s) at hand and define its context and parameters; identify a set of possible solutions; formulate strategies and recommendations for action; make decisions; and confront obstacles to implementation. (Golich et al., 2000, p.1)

### Difference with Traditional Instructional Methodologies

To better understand case studies and how the Kolb educator role construct may enhance learning, it is important to describe and analyze how case study instruction and traditional instruction are alike and how they are different. First, the learning objectives of the events are largely similar. Regardless of whichever approach is used to deliver a learning event or message,

Golich et al. (2000) contend that “educators want their students to be exposed to meaningful disciplinary content; to refine their critical thinking, analytical, and communication skills; and to gain in self-confidence, self-efficacy and social awareness.” (p.4)

The differences between case study experiential learning and traditional instruction can be contrasted by the pedagogies each employ to attain their educational objectives. Traditional teaching, for example, is premised upon the instructor communicating the information on an appropriate level and in an interesting manner. In a traditional approach, Golich et al. (2000) suggests that, “the professor is center stage, does most of the talking, and provides most of the information and analysis. Students become stenographers, trying to write down as rapidly as they can the font of data and interpretation flowing from the expert.” (p.4) Most times, learners play a limited role. With experiential case study instruction however, “students occupy center stage, and the educator’s role is as a ‘guide on the side.’” (p.4).

Importantly, according to Kolb, this educator role can – and should – take multiple identities to enhance the learning experience for the student.

### **Types of Case Studies**

Robert Yin, Sharan Merriam, and Robert Stake are widely recognized scholars in the case study literature. When analyzed as a group, Yin, Merriam and Stake appear to form of a continuum of case study approaches and objectives that while each different, are nonetheless complementary and supportive of the overall goals of experiential learning theory.

According to Yin (2014), a scholar who is widely recognized in the literature for the rigor of his approach to qualitative approaches, case studies can be used to “explain, describe or explore events or phenomena in the everyday contexts in which they occur ... the case study approach lends itself well to capturing information on more explanatory 'how', 'what' and 'why' questions,” (Crowe, Cresswell, Robinson, Huby, Avery, and Sheikh, 2011, p.4)

Over the years, Robert Yin has provided a rigorous outline for undertaking the instructional conduct of a case study, including outlining the major conceptual components found in a good learning event. Brown (2008), in referencing Yin’s “methodological rigor,” suggests that:

Case study instructional strategy contains five components: the study’s questions, its propositions which reflect on a theoretical issue, its unit(s) of analysis (the event, entity, or individuals noted in the research questions), the logic linking the data to the propositions, and the criteria for interpreting the findings. (p.4)

Along the continuum, Sharan Merriam’s orientation suggests that the case study can be further described as particularistic, heuristic, or descriptive. Brown (2008) in referencing Merriam’s “educator orientation,” suggests that:

Merriam describes particularistic as relating to the specific focus of the case. It can suggest to the reader what to do in a similar situation. A heuristic case study is able to shed light on the phenomenon, allowing the reader to extend their experience, discover new meaning, or confirm what is known. It explains the reasons for a problem, the background of the situation, what happened, and why. A descriptive case study is complete and very literal in its reporting of the findings of the research ...The descriptive

case illustrates the complexities of the situation, and presents information from a wide variety of sources and viewpoints in a variety of ways. (p.3)

Contrasting with Yin and Merriam, Robert Stake (2005) outlines yet three other broad categories of case studies, namely, intrinsic, instrumental, and collective. Brown (2008) in referencing Stake's "interpretive nature," suggests that:

His approach allows for greater generalization to larger populations and highlights his academic distinction as an interpreter. In believing that the most important role of the case study researcher was that of interpreter, his vision of this role was not as the discoverer of an external reality, but as the builder of a clearer view of the phenomenon under study through explanation and descriptions ... This constructivist position, Stake claimed, "encourages providing readers with good raw material for their own generalizing" (p.102) (p.5).

Brown (2008) in summarizing the conclusions of her study, envisioned a case study methodology continuum of Merriam somewhere near the middle, with Yin's work situated on the far right, and Stake's work located on the far left. "Merriam," Brown (2008) writes, "presented a balanced, pragmatic approach, while Yin was highly methodical and logical, and Stake was like an artist or poet, creating and crafting meaning." (p.7)

Please refer to the Case Study example in Appendix B for an application of Yin's methodology with Kolb's educator roles.

### **Benefits to Students**

Teaching is about learning, and learning is about actively partnering with the students. In capturing the essence of the benefits to the students, when educators align properly with the students, it is reported that the holistic learning objectives of connectivity, portability, teamwork, and retention, among others, are successfully achieved. Case study teaching:

Enhances learning by engaging students in very powerful ways. Teachers use cases because they believe that students learn more when they are at the center of the process (Boehrer, 1998). Case teaching actively connects students with course content and shifts responsibility for learning to students. With educators as their educational event partner, students simultaneously discover (or construct) a more holistic body of knowledge and master life learning skills. Importantly, the focus on process does not mean that facts, theories, and concepts are sacrificed. To the contrary - good cases are full of information and require students to apply text-based theory to analyze complicated, real world events. The difference is that active learning promotes deeper understanding and improved retention (Brown, Collins & Duguid, 1989). Running cases helps build interpersonal skills that find significant resonance with life after the university where teamwork can be as critical to success as the ability to work through problems individually. (Golic et al., 2000, p4).

Perhaps unique to case studies, given the student centered and directed focus of the learning event, students can adopt active learning responsibilities from the task-shifting educator to

provide further personal and educational developmental opportunities. For example, Columbia University Center for Teaching and Learning (2021) contends that the student's activities in a case discussion can include multiple roles that can initiate discussions, ratify others' opinions, recognize and link new knowledge, help focus the discussion on salient points, or summarize the findings:

Discussion 'starters' get the conversation started with a question or posing the questions that their peers came up with; facilitators listen actively, validate the contributions of peers, ask follow-up questions, draw connections, refocus the conversation as needed; recorders take-notes of the main points of the discussion, record on the board, upload to Course Works, or type and project on the screen; and discussion 'wrappers' lead a summary of the main points of the discussion (p.1)

### **The Case Study Record of Success**

Whether advocating the varied approaches of Yin, Merriam, or Stake, among others, case studies have an impressive – and ever growing - record of educational event successes. As a result of their long established history and educational momentum, case studies have emerged as the “most popular type of qualitative research” published in SAGE journals in 2017 (Salmons, 2017), the last date recorded at the time of this paper.

As for the rationale for the case approaches successes, Columbia University CTL (2021) suggests that “case method teaching has been found to improve student learning, to increase students' perception of learning gains, and to meet learning objectives (Krain, 2016; Thistlewaite, Davies, Ekeocha, Kidd, MacDougall, Mathews, Purkis, Clay, 2012)

Educators have witnessed that the learning benefits of cases include “greater student engagement in their learning (Yadav, Lundeberg, Deschryver, Dirkin, Schiller, Maier, Herreid, 2007, pp. 34-38) deeper student understanding of concepts, stronger critical thinking skills, and an ability to make connections across content areas and view an issue from multiple perspectives.” (Popil, 2011, pp. 204-207). Through case-based learning, students are the ones asking questions about the case, doing the problem-solving, interacting with and learning from their peers, ‘unpacking’ the case, analyzing the case, and summarizing the case. They learn how to work with limited information and ambiguity, think in professional or disciplinary ways, and ask themselves “what would I do if I were in this specific situation?” (Columbia CTL, 2021, pp.1-5)

Golich et al. (2000) provide a list of disciplines where cases work well. Please refer to Table 1 in Appendix A. Carlson & Schodt, 1995; Cliff & Wright, 1996; Dori & Herscovitz, 1998; Flynn & Klein, 2001; Golich et al., 2000; Herreid, 1994; Herreid, Schiller, Herreid & Wright, 2011; and Bonney, 2015 document a similar impressive universe of successful implementation of case studies.

### **Case Study Link to Experiential Learning Theory:**

When all the evidence is summed, case studies appear to fill a recurring curricular void that experiential learning events seek to fulfill. It is not to be expected that all courses – or even the majority of courses in any discipline - can have an out-of-classroom, real world component built into the fabric of the course. To that end, case studies can provide an opportunity to bring

real life challenges and complex decision-making into the classroom. Stake (1994) contends that, "... the utility of case research to practitioners and policy makers is in its extension of experience" (p. 245). (Winnepeg, 2021)

Moreover to the contention of the benefits of case study based experiential learning, Columbia University CTL suggests that "the case method bridges theory to practice, and promotes the development of skills including: communication, active listening, critical thinking, decision-making, and metacognitive skills as students apply course content knowledge, reflect on what they know and their approach to analyzing, and make sense of a case – all of which add to foundational knowledge and experience of the student." (pp.1-5)

Brown (2008) adds that case study provides an integrated interpretation of situations and contexts - in short, the real world – so as to generalize and port this expanded knowledge and experience into the learner's future lived world. In constructivist commentary on the topic, Stake claimed that a case study "encourages providing readers with good raw material for their own generalizing" (p.102). The objective of the instructor is to identify "coherence and sequence" (Stake, 2005, p. 444). The case needs to be constructed to recognize real world challenges – "complex, situated, problematic relationships" (Brown, 2008, p.7) – and questions around these issues will help deepen the theme of the case. Stake (2005) noted that the contexts of the case, "whether they are social, economic, political, moral, ethical, or psychological, are important to consider, and they go a long way toward making relationships understandable" (p. 449).

Finally, Davis (1993) links additional elements of a case study to experiential learning by linking to the real world, employing qualitative and quantitative data analysis, and applying critical thinking techniques to complex problem solving and decision-making:

Tells a 'real' and engaging story; raises a thought-provoking issue; has elements of conflict; promotes empathy with the central characters; lacks an obvious or clear-cut right answer; encourages students to think and take a position; portrays actors in moments of decision; provides plenty of data about character, location, context, actions; and is relatively concise. (Davis, B. G., 1993)

## **CASE STUDY AS A NATURAL EDUCATOR ROLE PLATFORM**

Owing to the quest for student-learner experiential learning partnerships, Kolb's educator roles provide a compelling platform for enhancing the learning objectives of a case study by providing a process-driven framework for instructor interactions. Embracing Kolb' experiential learning theory and its educator roles, instructors will exploit the many benefits of case studies by encouraging the learner to systematically rotate around the experiential learning cycle. In rotating around the experiential learning cycle, the student is guided to experience, reflect, conceptualize and experiment with challenges, teammates, decision-making strategies, new knowledge, and varying scenarios, among other objectives and phenomenon.

## **INTRODUCTION TO KOLB'S EXPERIENTIAL LEARNING THEORY**

Because experiential approaches have improved learning outcomes in other disciplines (Kolb & Kolb, 2014; Prince & Felder, 2006; Slavich & Zimbardo, 2012; Sugarman, 1985), this paper outlines an experiential instructional framework overlay to be applied to case studies. Pursuant of enhanced student learning and leveraging existing case study literature, this paper

proposes a holistic, student-centered, philosophically-based process where case study instructors use experiential learning theory principles and teach around the experiential learning cycle (ELC), adopting the top down educator roles of facilitator, expert, evaluator, and coach and in turn, guiding the student around the ELC to experience, reflect, conceptualize, and experiment (Kolb, 1984; Kolb & Kolb, 2013; Kolb et al., 2014).

The dynamic nature of Kolb's Experiential Learning Theory (KELT), this paper's proposed approach to enhanced case study learning, presents a more complex, but also a more realistic model for educational practices than do simple recommendations to teach to personality styles, perceived cognitive abilities, match learning styles, or to practice simple role reversals (Coffield, Moseley, Hall E., & Ecclestone, 2004; Jensen & Kolb, 1994; Kolb et al., 2014). During the case student event, KELT recommends that the educator consider linking the time varying roles to the student, the specific learning goal, the challenge, or the subject matter (Kolb et al., 2014).

### **Kolb's Experiential Learning Theory (KELT)**

Echoing the objectives expressed in case study learning events by its leading scholars, namely Merriam, Yin, and Stake, Kolb's Experiential Learning Theory (KELT) provides a holistic framework of the participant learning process and a multi-linear model of individual development, both aligned with what the literature has suggests about how students learn and grow (Kolb 1984; Sharma & Kolb, 2010).

Research and observation suggests that individuals vary significantly in the speed and manner in how new skills, knowledge, behaviors, or attitudes are acquired (Anderson, 2003; Coffield et al., 2004; Kolb, 1984; Sadler-Smith, 1996, 2000; Vermunt, 1994, 1998). Specifically, educational literature contends that individuals learn in different ways and that any one approach, however well orchestrated and executed by the instructor, will not likely work for everyone, every time. (Buch & Bartley, 2002; Coffield et al., 2004; Grasha, 2002; Lewis & Margerison, 1979; Pashler, McDaniel, Rohrer & Bjork, 2009)

### **KELT as a Two-Dimensional Learning Process**

Already well known in the literature, Kolb's Experiential Learning Theory is anchored by a two-dimensional learning process. "The first dimension, grasping, spans from a preference for tangible, concrete interactions to one that is detached, intangible, and requires an analytical approach (Kolb et al., 2014). The second dimension, transforming, spans from the learner preferring an observational role to one seeking active participation" (Kolb et al., 2014; Slavich & Zimbardo, 2012). In this way, KELT provides for the foundational support for the enhanced learning objectives of case studies exercises.

At the student level, KELT is defined by the four modes of concrete experience (CE), reflective observation (RO), abstract conceptualization (AC) and active experimentation (AE) (Kolb, 1984) which in turn, are defined by the two dimensions of grasping and transforming knowledge. In any learning event, (Kolb, 1984; Kolb et al., 2014; Kolb & Fry, 1975) suggests that, "during the CE mode, individuals engage themselves completely, openly, and without bias to new experiences. In the RO stage, learners reflect on the experience. In the AC mode, students seek to understand these new observations and integrate them into theories. Finally, in the AE stage, learners test these theories and employ them as foundations for new decision-

making and problem-solving environments” (Kolb, 1984; The Hay Group, 2009, p. 214). Please refer to Figure 1 in Appendix A.

Borrowing from KELT and active learning (CE, RO, AC and AE; see below), for a case study learning event to be successful in meeting its learning objectives, its analysis must not stop at simply summarizing the case. “Instead, the student should identify key issues and problems, outline and assess alternative courses of action, and draw appropriate conclusions, all activities that can be broken down – and linked to KELT’s modes on the experiential learning cycle - in the following manner by Laudon & Laudon (2011) or by Yin (2014), respectively:

1. “Identify the most important facts surrounding the case.” (CE)
  2. “Identify the key issue or issues.” (RO)
  3. “Specify alternative courses of action.” (AC)
  4. “Evaluate each course of action.” (AC)
  5. “Recommend the best course of action.” (AE). (Laudon & Laudon in Pearson 2011, p.1)
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1. “The study’s questions“ (CE),
  2. “The propositions that reflect on a theoretical issue.” (RO),
  3. “Its unit(s) of analysis (the event, entity, institution, or individuals noted in the research questions).” (AC),
  4. “The logic linking the data to the propositions.” (AC)
  5. “The criteria for interpreting the findings.” (AE) (Yin, 2014, p. 137)

## Learning Styles

By placing the grasping and transforming dimensions orthogonal to each other and labeling the modes, Kolb (1984) describes a four-stage, circular process of learning (Buch & Bartley, 2002; Hunt, 1987; Kolb, 1984). The four original learning styles that result, each a combination of grasping and transforming, are defined as Converging, Diverging, Assimilating, and Accommodating (Kolb, 1984; Kolb & Kolb, 2005). Later research expanded the four-stage framework into a nine-stage construct, with Kolb labeling the new styles as Initiating, Experiencing, Creating, Reflecting, Analyzing, Thinking, Deciding, Acting, and Balancing (Kolb, 2011; Kolb & Kolb, 2011, 2013). Please refer to Figure 2 (Appendix A).

For case studies, these dimensions, modes, and resulting learning styles can create a holistic approach to case study based learning for the student. Theoretically, a completed cycle gives way to another experiential learning cycle - likely with a more complex case study – and the process begins anew (Buch & Bartley, 2002; Gagne, Yekovich & Yekovich, 1993; Hawk & Shah, 2007; Kolb, 1984). Please see Figure 3 (Appendix A).

It is important to note that Kolb does not advocate learning styles matching, specifically linking the instructor’s learning style to the student’s learning style. Timura (2012), among others, have provided evidence against the learning styles matching contention.

## INTRODUCTION TO KOLB’S EDUCATOR ROLES

Beyond a holistic learning and development design for the student, and central to the recommendation of this paper, Kolb advocates an experiential learning theory role construct that allows an instructor to become a more effective and balanced case study instructor. This educator

role framework helps the instructor to make informed choices about which role to adopt for a given case study message, student, or analytical challenge (Abbey, Hunt, & Weiser, 1985; Boyatzis, Cowen, & Kolb, 1995; Hickox, 2002).

KELT suggests that the process of the instructor teaching around the ELC introduces the need for conscious adjustments in the educator's role (Dede, 2011; Passarelli & Kolb, 2011). Importantly, this suggests that educator roles go beyond any singular teaching or matching-oriented style (Kolb et al., 2014; Timura, 2012). To this end, Kolb uses the terms facilitator, expert, evaluator, and coach to describe the four roles within the context of the experiential learning cycle. Each educator role engages students to learn in a unique manner, and with differentiated tools and techniques and objectives. Please see Figure 4 (Appendix A).

### **Facilitators, Foundational Knowledge, Continuum,, and Schema**

KELT suggests that, “the Facilitator adopts an affirming style to draw out student interests, intrinsic motivation, and self-knowledge, oftentimes necessitating creative question creation and a personal relationship.” (Kolb et al., 2014, pp. 220-221)

Schema Theory is employed as a tool for facilitators. Schema provides the necessary mental maps that students will use to give form to the new case study information (Driscoll, 1994). Kant (1929) is generally considered to be the first to discuss schemas as organizing structures that mediate how one views and interprets the world (Johnson, 1987). Thus, schema discovery reveals the frameworks that students already possess, suggesting clues about their preferred language and insight into lived worlds (Labianca, Gray & Brass, 2000; Taylor & Crocker, 1981). Schema are particularly important as new, more complex investment information needs to be assimilated or accommodated into existing schema (Piaget, 1952) or if none exist, developed and natured to allow the new knowledge to connect (Bruner, 1966).

While generally linked with the learner, schema theory has equally important implications for how the instructors view the learning interaction (Hacker, 1980; Weaver, 2002). Analogous to Dewey's continuum, Bruner (1966) states that there is “a continuity of knowledge” sought by the instructor that connects ideas in the past with the new ideas of today (Hacker, 1980; Howard, 1987; Saito, 2000; Weaver, 2002).

### **Experts, Stories, Narratives, Analogies, Metaphors, and Continuity**

In the Expert role, Kolb suggests that, “Instructors adopt an authoritative, reflective style and teach by example, modeling and encouraging critical thinking as they systematically organize and analyze the knowledge” (Kolb et al., 2014; pp. 220-221). Stories, lectures, outside reading, problem based tools, etc. are employed as means to engage “Continuum Theory” (Bruner, 1966). It has been suggested that expert's stories, metaphors, analogies, and narratives (hereafter stories) – situated in the everyday language and lived world of the student - may be among the best tools to develop the new investment messages and to satisfy the linkage requirement to the foundational knowledge. Stated differently, it may be important for the educator to link via stories - perhaps through problem-based learning which embed stories in vivid personal realities (Lovicsek, Crowley, and Anderson, 2003; Norman & Schmidt, 1992; O'Donnell & King, 1999; Van Berkel & Schmidt, 2000) - to the student's foundational knowledge, thereby forming an information continuum. Otherwise, if not properly connected,

stories, while entertaining, may be quickly forgotten (e.g. the “one act magic show” per Hawk & Shah, 2007, pp. 1-4), misinterpreted, or incomprehensible.

### **Evaluators, Performance Requirements, and Communication**

At this point, as an Evaluator “clear standards and feedback are provided whereby educators, adopting an objective results-oriented style, help learners master the application of knowledge and experience in order to meet high quality analytical, original research, and communication-oriented performance requirements” of addressing the case study’s solution (Kolb et al., 2014, pp. 220-221). Once the new knowledge connection is made or the path of information continuity established, the link of the new information to the prior knowledge can be made complete and enable the new message to better resonate. When successfully connected to foundational knowledge, new information may be effectively employed in an application-based roadmap, many times a conceptual themes based or coding oriented template developed in partnership with an evaluator to empower the learner to refine and effectively communicate her message.

The evaluator role is particularly important in case studies because case studies do not have a universally accepted or recommended reporting format. In addition, oftentimes, the quality of the analysis is reflected in the quality - real or perceived - of the written and oral report of the learner’s recommendation.

### **Coaches, Intentional Change, and Self-Efficacy**

Finally, Kolb suggests that, “Coaches adopt a collaborative encouraging style, often working one-on-one with learners to help them learn from experience in their life context” (Kolb et al., 2014, pp. 220-221). Intentional Change (ICT) and Self-Efficacy Theories are introduced. Boyatzis clarifies learning event obstacles with ICT, suggesting that individuals learn what they want to learn in the spirit of achieving their ideal self while other lesser important messages are soon forgotten (Boyatzis, 2001; Specht & Sandlin, 1991). By personalizing the action recommendation within the context of the student’s concept of her “ideal self,” the instructor, acting as a coach, may see that the student is more likely to want to take the necessary actions to learn the material (Boyatzis, 2001). To this end, educators should seek to engage the student such that the learning event motivates the students to want to change to become their ideal self (Boyatzis & Alkriovou, 2006).

Another key aspect of peoples’ beliefs about themselves is their views about their learning ability. Self-efficacy theory suggests that if individuals do not believe they can learn, they will not, likely either withdrawing or quitting (Zimmerman, 2000). The phenomenon introduced by case study instructors to accentuate positive self-efficacy should be that of I can learn and apply the knowledge and experience from this case study.

Researchers suggest that self-efficacy is a strong predictor of an individual’s learning and motivation (Bandura, 1977). Bandura (1977) wrote that self efficacy will play a larger role than any outcomes based motivation in learning because “the types of outcomes people anticipate depend largely on their judgments of how well they will be able to perform in given situations.” (Bandura, 1986, 121) Positive self-efficacy was also linked to higher energy and effort, both correlated with learning persistence. Those individuals who believe that they can learn and develop have a positive learning identity, embracing challenge, persisting in the face of

obstacles, learning from criticism, and inspired by others, while those who have a negative learning identity avoid challenge, give up easily, and avoid criticism (Bandura, 1977). As a coach, the instructor seeks to provide constructive feedback and strong encouragement.

### **Effective Educators**

Above all, KELT stresses that highly effective educators do not rely on any single role in any one learning event (Dede, 2011; Passarelli & Kolb, 2011); instead, they organize their roles and activities (e.g. roles) to address all four student-learning modes. In this way, educators lead the student through the experiential learning cycle, shifting the role from facilitator to expert to evaluator to coach depending upon which stage of the cycle they are addressing (Passarelli & Kolb, 2011). The role employed, in turn, creates a learning environment designed to promote holistic learning by facilitating the transition of the student from one mode to the student who is motivated to move around the ELC -in short, to become a balanced learner (Raschick, Maypole, and Day 1998; Sharma & Kolb, 2010).

To this end, the case study's link to the KELT student and educator is pedagogically compelling and operationally fluid, as evidenced below by the references to immersing oneself into the case, assuming responsibility for learning, experiencing self discovery, and confidently constructing new knowledge. Golich et al. (2000) contend that the case instructors objective is to:

Frame the case with questions that compel students to 'inhabit' the case in that they must seek the best available answer under similar decision-making constraints as those prevalent in the 'real' event. Students assume a large measure of responsibility for both course content and the learning process. As they proceed through their collaborative deliberations, they not only discover facts and principles germane to the assigned specimen, but they also begin to reflect on and discover facts and principles germane to the investigative process itself.) As they 'unpack' the case, they seek a collective answer to "What is the essential nature and significance of the specimen?" ... 'What are the properties of a good analysis?' and 'What constitutes acceptable argumentation?' ... A case teacher refuses to cheat students by giving away the answers, recognizing the powerful learning that occurs when students discover and construct their own knowledge base and grow in confidence with their learning. (p. 12)

Mirroring KELT, the case method is consistent with a philosophy of instruction that per Pew's Golich et al., 2000 states can improve critical thinking, learning flexibility, knowledge and experience application and future portability, and provide for a foundational mosaic of prior knowledge and experience:

Assumes a major goal of higher education is to empower students to think critically and act responsibly in their various roles .... asserts that students must be able to apply the collection of concepts and facts they learned to new situations; and posits that integrating knowledge from other classes and/or life experiences is important. (Golich et al. 2000, p.8)

### **So What is a Case Study Educator? A Musical Lens**

With case study teaching, the instructor aids learners to engage the material to understand its breadth and scope. When engaged, “students are asked not only to learn the theory but also to apply it to the complex nature of the real world. “In the process, students learn facts because they are central to case analysis; they also acquire requisite life-long learning skills of analysis, communication, and collaboration because they are necessary tools to unravel the puzzle that is the case.” (Golich et al.,2000, p.4).

Echoing Kolb’s educator roles, Golich et al. (2000) cleverly describes a case teacher as one who resembles an “orchestra conductor” who alone cannot achieve the learning goals but with the student as a partner, can attain the event’s goals. (p.4)

### **Case Studies, Kolb’s Educator Roles, and Pedagogy**

Taken together, top-down, philosophical, process-oriented, integrated, student centric, holistic, etc. are particularly noted as consistent topics of focus of the case study research community and the Kolb experiential learning theory framework. In short, Kolb’s educator role construct appears to be a viable answer to the research question that seeks ways to enhance the case study learning event for both the educator and the student.

### **Importance of Educational Philosophy and Process**

Educational philosophies and processes are important components to any educational event. An experiential learning philosophy and process is critical because, as noted by Grasha (1996a, b) without an explicit philosophy of interaction, the act of teaching may be “intellectually hollow.” Jerome Bruner in *Toward a Theory of Instruction* states, “the purpose of education is to broadly stimulate inquiry and skill in the process of knowledge building for some productive future use, not to simply memorize a body of knowledge for an outcomes exercise” (Bruner, 1966). Echoing Bruner, Merriam (1998) suggested “the choice of case study design as a way to gain understanding of the situation, where the process of inquiry rather than outcome of the research are of interest to the investigator.” (Merriam, 1998, p.449)

### **Importance of a Holistic Approach to Learning and Personal Growth**

While the case study is oftentimes limited in scope, the observations can be generalized with the case study providing valuable and expandable insights into real world challenges and decision-making. It can “contribute uniquely to our knowledge of individual, organizational, social, and political phenomena” (Yin, 1984, p. 14); in short, to developing the whole person.

Learning is best when situated in the person’s lived world (Lave & Wenger, 1991). To this end, in his early work on case study methodology, Stake (1995/2000) maintained that “case studies are useful in the study of human affairs because they are down-to-earth and attention-holding” (p. 19) and that “this approach to research makes sense to readers because it resembles our understanding of the naturalistic world through our personal experiences and lived worlds.” (p. 20) “Case studies will often be the preferred method of research because they may be epistemologically in harmony with the reader’s experience and thus to that person a natural basis for generalization.” (Stake 1998, p.21)

## **Importance of Integrated, Learner-Centered Framework**

With the vast number of educational theories and procedures that abound in practice, it is easy to overlook an important point – teaching is an integrated personal relationship (Kolb et al., 2014). KELT suggests that “learning is not something one does to students through the implementation of a set of techniques rather it is what educators do with learners in the context of meaningful relationships and shared experiences” (Kolb et al., 2014). In the end, the conscious planning and construction of holistic student experiences is as an important element of effective education as is active educator participation (Abbey, Hunt, & Weiser, 1985; Palermo, Walker, Brown, and Zogi, 2009)

Others, specifically case study advocates, agree with the focus on the student because of the actively positioning of the student in the event as the center of learning.

Case teaching grounds academic instruction in reality by engaging students directly in the discussion of specific situations. Case teaching is learner centered, characterized by intense interaction between instructor and student as well as among students in a group. Conceptually, case teaching assumes that learning is more effective if students discover or construct knowledge with faculty guidance than if they sit passively and receive content from a distant ‘sage on the stage.’ (Golich et al., 2000, p.4)

In short, students’ learning responsibilities matter in achieving the objectives of self-efficacy, holistic learning, portable knowledge and experience, and critical thinking.

Students are given significant responsibility for what and how they are learning. The instructor ... is no longer the ‘automatic teller machine’ spewing forth facts and theories, but the orchestra conductor attempting to elicit each student’s personal best. As with a musical group, the conductor—the professor—is essential to achieving excellence. ... The teacher helps students work collectively through the material to understand it. Students are asked not only to learn the theory but also to apply it to the messiness of the real world. In the process, students learn facts because they are central to case analysis; they also acquire requisite life-long learning skills of analysis, communication, and collaboration because they are necessary tools to unravel the puzzle that is the case.” (Golich et al., 2000, pp. 4-5)

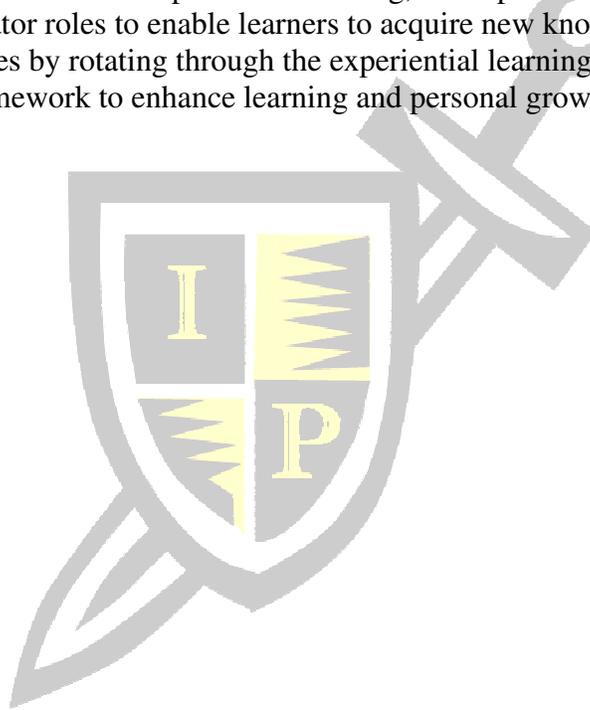
## **A Recommended Kolb Experiential Learning Theory Case Study Discussion Framework**

KELT and Merriam, Yin, and Stake share much pedagogically, each suggesting the importance of philosophy, process, student centricity, experience, development, and portability to experiential events that achieve the learning objectives. To that end, this paper suggests that KELT – and its focus on experience, personal development, learning styles, and educator roles to aid students in acquiring new knowledge and experiences – will enhance the learning outcomes of case studies. Kolb’s educator roles provide a plan of active engagement that is consistent with the goals of experiential learning events. Specifically, the engagement of the educator with the case study learner through the roles of facilitator, expert, evaluator, and coach will help foster foundational knowledge discovery; new and advanced message connectivity from stories,

narratives, problem based activities; applications based roadmaps for quality outcomes; and a more confident path to future knowledge portability, respectively (Kolb, et al., 2014; Timura, 2012). These critical roles and actions of the case study instructor, in turn, allow the students – who are being motivated to move around the experiential learning cycle to experience (CE), reflect (RO), conceptualize (AC), and experiment (AE) – to effectively learn, grow, and achieve broadly defined improvements in knowledge, event satisfaction, personal development, and future behavior from the case study events. Please see Case Study example (Appendix B).

### **Unlike Other Research and Contribution to the Literature**

In contrast to bottom-up case study recommendations for enhanced data analytical techniques, increased student role responsibilities, participant self-selection of cases, more varied topical areas of study, etc., this paper's central message is that Kolb's experiential learning theory – and its top down focus on experiential learning, the experiential learning cycle, holistic development, and educator roles to enable learners to acquire new knowledge, skills, experiences, and attitudes by rotating through the experiential learning cycle – will provide a proven pedagogical framework to enhance learning and personal growth with case studies.



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APPENDICES

Appendix A

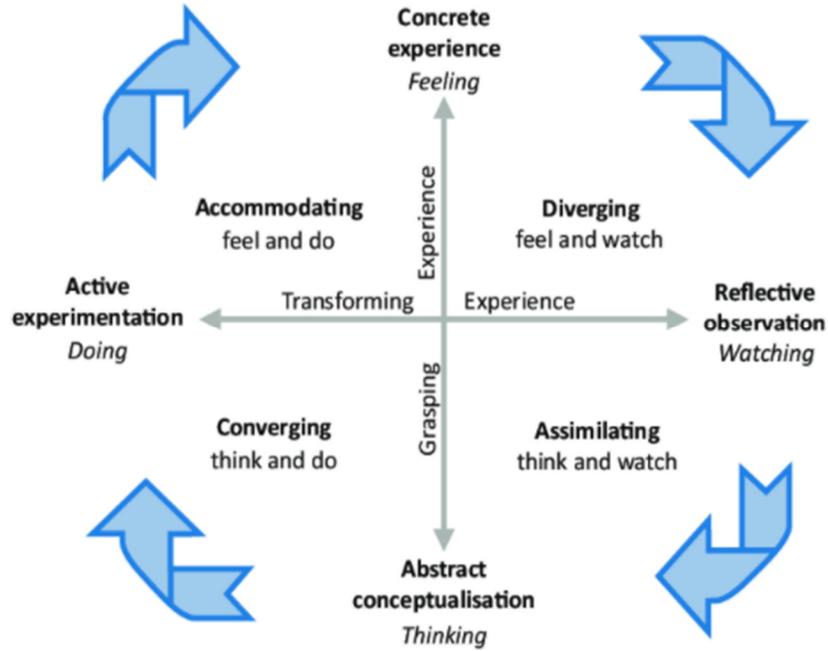


Figure 1: Kolb's learning cycle and experiential learning styles. Kolb, A., & Kolb, D. (2018)

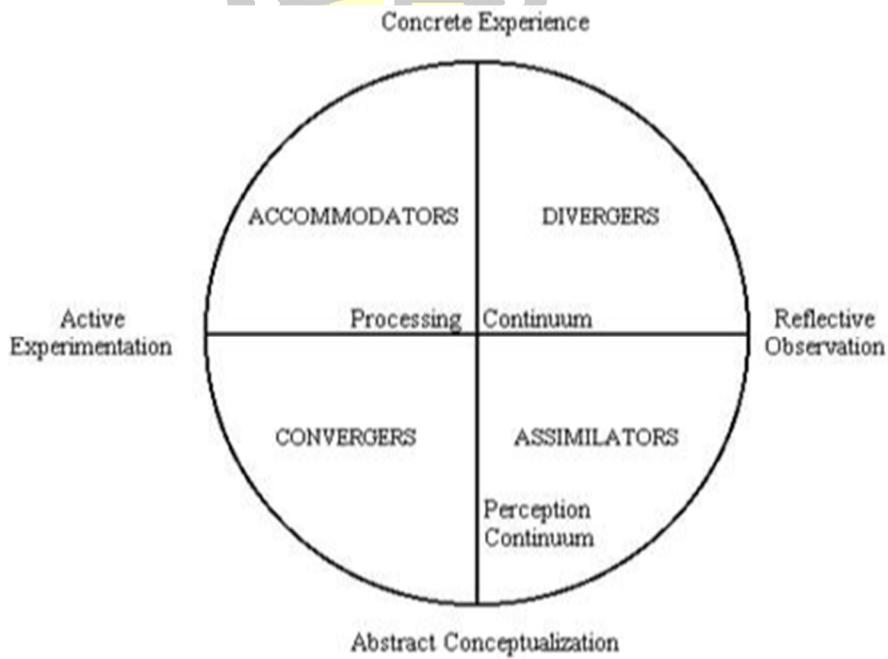


Figure 2: Kolb's Learning Styles. Kolb, A., & Kolb, D. (2018)

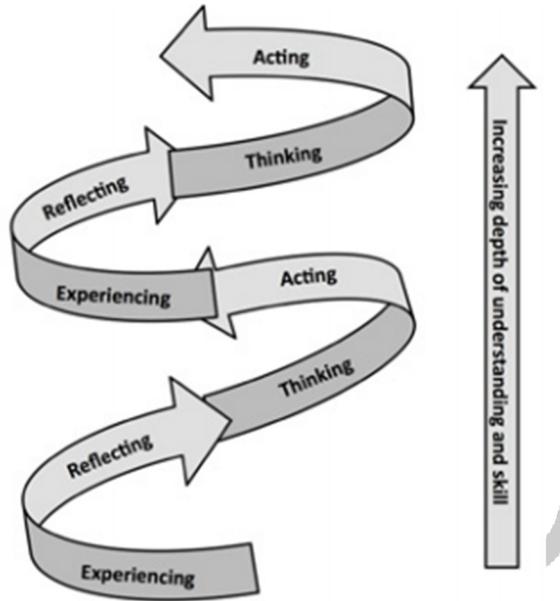


Figure 3: The Experiential Learning Spiral. Kolb, A., & Kolb, D. (2018)

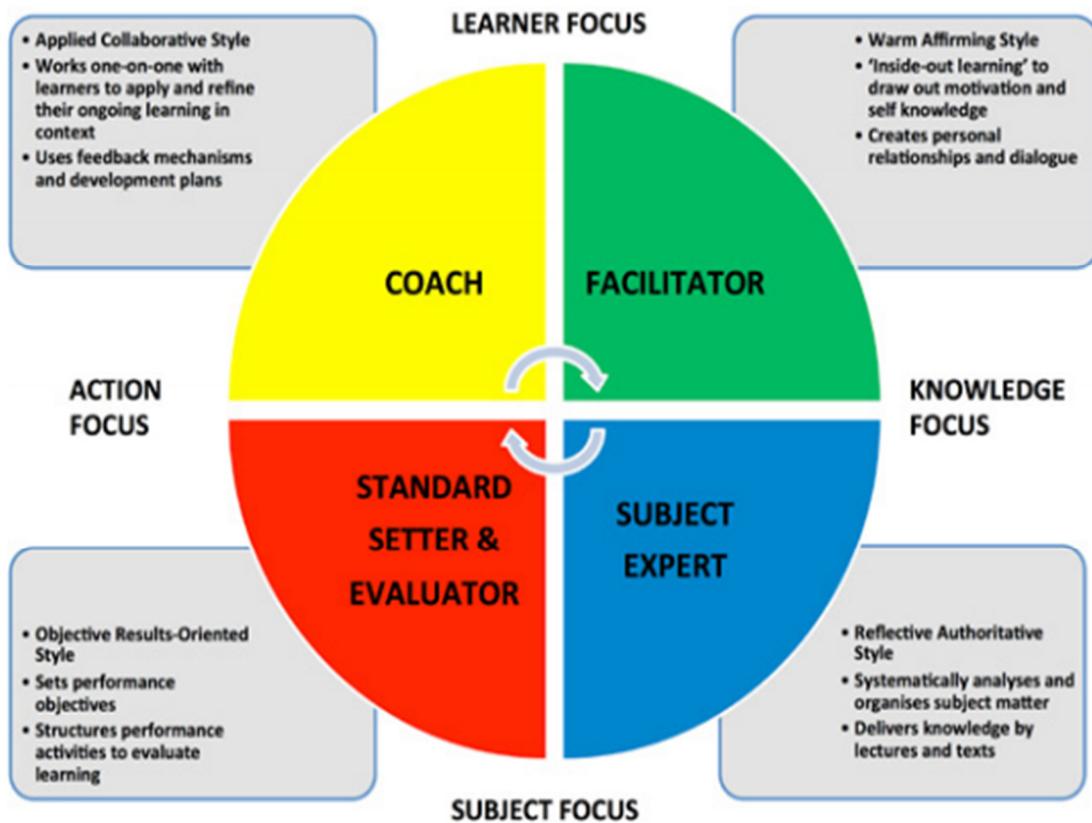


Figure 4: Educator Role Profile. Kolb, A., & Kolb, D. (2018)

Accounting	Allied Health	Arts	Biology
Business	Communications	Computer Science	Information Systems
Counseling	Criminal Justice	Curriculum Development	Data Processing
Drama	Economics	English	History
Human Services	Human Studies	International Studies	Management
Mathematics	Nursing	Philosophy	Photography
Professional Development	Psychology	Reading/ Writing	Social Sciences
Sociology	Speech	Telecommunications	Zoology

From Golich et al. 2000 Pew Foundation

## Appendix B: Case Study Example

The Objective of this Hypothetical Case Study Example is to aid the student in understanding the assessment, management, strategies, and outcomes of operating leverage and financial leverage on a company's results throughout a full economic cycle.

This simple case study analysis suggests the marriage of the Kolb Educator Roles; the tools and techniques of the Kolb educator; the case study goals of the students; and the case study strategy component recommendation of Yin.

### Educator Roles

**Facilitator:** Apply schema theory principles to establish foundational knowledge (i.e., knowledge and experience). For example, uncover, reinitiate, or reinstate the basic principles of economic cycles and their characteristics; financial statements and their elements; variable and fixed costs definitions; and the link of leverage to idiosyncratic risk, etc.

Facilitator Tools & Techniques: Schema Theory

Student = identify – and seek to understand - the important basic “facts” surrounding the case; linked to Concrete Experience (CE)

Yin: Address the study's questions

**Expert:** Employing stories, narratives, problem-based learning, lectures, and readings, introduce advanced theories of economic, business, and market cycles; develop the DuPont methodology as an analytical tool; expand managerial accounting's assessment value; articulate time varying nature of optimal capital structure; discern what market expectations may be signalling in prices, etc.

Expert Tools & Techniques: New knowledge in stories, lectures, readings, etc. that connect to existing Schema

Student = identify the “key issues” of the case; specify alternative course of action; linked to Reflective Observation (RO) and Abstract Conceptualization (AC)

Yin: The propositions that reflect on a theoretical issue; the logic linking the data to the propositions; the unit(s) of analysis (the event, entity, or individuals noted in the research questions).

**Evaluator:** Applying high quality advanced analysis and communication tools that include performance-oriented guidelines for scenario and simulation-based analysis; Value-at-Risk

(VaR) and Expected Shortfall (ES) measures; Economic (EVA) and Market Value Added (MVA) insights; analyse market-based expectation signals across sector, industry, and the company

Evaluator Tools & Techniques: High quality, performance roadmaps; specify alternative courses of action and effective communication thereof

Student = evaluate reasonable courses of action and variables that need to be addressed; linked to Abstract Experimentation (AE)

Yin: The criteria for interpreting the findings

**Coach:** Invoking theories of one's ideal self and self-efficacy to allow students to visualize their desired professional self and to promote the message of you can do this analysis and make these important decisions

Coach Tools & Techniques: Focused on learning momentum and motivation

Students = see how case study experience can help with personal, professional and overall educational growth goals

