Research Opportunities Featuring Christian Businesses: Case Teaching Notes, Tackling the Hard Part First

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INTRODUCTION

When conducting research, the author often has a pre-conceived idea on what is the likely outcome. With basic research, there is generally a stated hypothesis, and the research sets out to either prove or disprove this hypothesis. With applied research, data collection is often used, and there is some expectation on what the results will be. In case studies, a less familiar research area, results can be entirely different than expected for a variety of reasons, some of which could be totally unforeseen by the author. This increased uncertainty can make the research process more enticing or have a severe detrimental impact on the study to the point of curtailing the case study altogether.

In my case research, I prefer working with leaders of Christian-based businesses whenever possible because there is an element of common ground as a starting point. The shared beliefs and values enhances the bond between interested parties, which promotes achieving a desirable outcome. It is therefore critical in this research venue that a level of trust and integrity be immediately established between both parties and a realization that the eventual case publication can be a win for both parties.

About outcomes, there can actually be multiple win situations with these stakeholders and other interested parties: a win for the company that competes and maintains its Christian values and standards; a win for students, especially those attending a Christian-based university, who experience a "real-world" situation of how a Christian-based business operates; and finally, a win for the author, who establishes a relationship with leaders from a Christian business and has the research opportunity to integrate theoretical concepts and models with actual Christian practices and operations.

In conducting my case study research, I have seen all extremes in outcomes, even with Christian businesses. Since my area of expertise is in accounting, I typically seek situations in a company where there is an accounting dilemma. As an example, suppose I want to develop a case study in which a company is seeking additional outside funding to help in an expansion program. Here is a summary of actual outcomes that have actually happened.

There have been companies agreeing to fully cooperate with such a case situation, including a willingness to share financial information and not require any disguise of the company name, business, or location. Even in situations like this, I will recommend disguising names and locations at a minimum and adjust numbers in some fashion that will not compromise the case, like doubling the numbers.

I have also had companies facing such a dilemma but not willing to make financial information public knowledge. Some companies might agree to percentages and limited financial data, and some companies may be unwilling to give any sensitive financial information. Here is a situation where the outcome of doing the case is totally unexpected. As the author, I can either work with the company and the information they are willing to share and adjust the case accordingly or consider a different case scenario.

In situations where I need to expand my options, I have found that leaders of Christian-based companies are generally willing to try to cooperate in completing a case study. Many will go out of their way to propose scenarios which can be acceptable to all parties. Without the availability of financial information, most often, I find case opportunities in disciplines outside my area of expertise, like marketing or management.

There have also been situations during all phases of the case study development when the Christian business leader has second thoughts and major reservations regarding the completion of the case study. The leader and/or protagonist in the case study must sign a case release form giving

the author the right to publish the case study. For various reasons that option becomes untenable. This unsuspected outcome results in the termination of the research. With case research, there is always the very real threat that the effort will be unsuccessful due to circumstances out of your control.

So, with this level of outcome uncertainty, the question becomes: Why do the case research in the first place? A second question more specific to this paper would be: Why start with the teaching notes? And for many readers who have not done case study research, a more basic question would be: Exactly what are teaching notes?

TEACHING NOTES: GENERAL THOUGHTS

Teaching notes are essentially the author's attempt to promote and justify the case study and to provide guidance and direction for the practical implementation and presentation of the case to students. In a basic sense, this is the solutions manual, but teaching notes really go much deeper and can be more critical as will be addressed in this paper.

Going back to the outcome-orientation focus, teaching notes can help the author to formulate exactly what he/she intends to accomplish with the case study research. I like to consider the phrase "Begin with the end in mind." If you don't have a plan, how do you know where you are going?

Along with the development of the case itself, who is your target audience? Before starting the case writing, it is a good idea to have in mind the type of case, the specific academic discipline; the scenario; the decision; the relevant theory, concepts, or models; the academic rigor, and the respective level of student understanding or knowledge. These criteria are all subject to change as the case is developed, but having the teaching note available to document some of these objectives prior to the case writing lends structure to the process.

For case research to qualify as academic research, there needs to be evidence of an application to theory or some measure of academic knowledge, like the understanding and implementation of concepts or models. The teaching note is the venue used to convey this information. It also gives the author the opportunity to specifically illustrate how the theory, concepts, or models are applicable to the situations in the case study and gives robustness to the case as an academic exercise.

In this era of accreditation, assessment, outcomes, and learning objectives, the teaching notes will provide the opportunity to identify what the author hopes to accomplish in learning objectives. To give further credibility and support to the outcomes, specific questions can be developed that coincide with the objectives. Again, these are subject to change through the case development process, but the teaching note provides the place to address these critical components.

Unlike other forms of research, there is really a marketing dimension to a case study. Case studies provide an ideal venue to the professor to present "real-world" situations in a student classroom environment, which can effectively link the theoretical with the practical. This very effective form of teaching is gaining in popularity and application at all levels of college education. The author is in the business of convincing instructors that his/her case should be selected for use in a course. After the case itself, the teaching notes provide multiple opportunities to entice instructors into adoption.

While the teaching note serves many purposes, and can appear complex, which it is, its completion can be simplified when considering each of its various sections independently. As indicated, some sections can be at least started before the case, some sections can be written concurrently with the case, and some sections are best left until after the case. Also, all sections are subject to change and modification throughout the process.

Once completed, the teaching notes are most likely going to be longer, and perhaps substantially longer, than the case. However, only the case will be published and subject to public availability. The teaching notes, after satisfying the standards for publication, will remain in possession of the author and possibly the publisher. As an extra bonus, the author will have the opportunity for royalties if the case is adopted by various users.

This paper will next review what is expected in each of the sections of the teaching notes.

CASE SYNOPSIS/ABSTRACT

The terms "synopsis" and "abstract" are somewhat synonymous. They are essentially a summary of the case and/or teaching notes. Some publishers will ask for an abstract to be printed at the beginning of the case itself and then want a synopsis at the beginning of the teaching notes. Some publishers will just call this component an abstract for both the case and teaching notes. However, there are differences in the composition of each document according to its intended use and purpose.

The abstract tends to have a word limit and will give a very brief highlight of the case. It may include its purpose; the general theory, concept, or model being presented; and

will probably include the decision situation, dilemma, or issue being addressed. It basically sets the stage for the reader and logically leads into the presentation of the case itself.

A synopsis is either the same as an abstract, if defined that way by the publisher, or more likely expands beyond the abstract. In addition to including all the information presented in the abstract, the synopsis may also address the identification of the setting, which could include the company, industry, location, time frame, and name of the protagonist and other important people. The synopsis should also indicate if the case is decision-based, which is generally based on field research, or descriptive, which is based on secondary information.

The synopsis should also have a list of keywords or issues. This component gives short statements that can help to highlight the critical theories, concepts or models that apply; the applicable academic discipline; and potential student "takeaways."

While the abstract attached to the case gives the reader a quick picture of what to look for in the case, the synopsis attached to the teaching notes gives the instructor a broader picture of both what to expect in the case and some highlights of what to expect in the teaching notes. The abstract is listed before the case and the synopsis is the first section of the teaching notes.

LEARNING OBJECTIVES

The learning objectives are a very important component of both the case development and teaching notes construction, which could explain why this section appears early in the teaching notes. It is beneficial for the author to attempt to formulate the learning objectives prior to the development of the case with the understanding that these objectives could be easily changed or at least modified through the case research and writing process. By identifying at least some of the learning objectives at the start, this helps the author develop a framework and approach to the entire case and teaching note process. Generally, three or four learning objectives are sufficient for a case presentation.

A common practice in the development of learning objectives is to use Bloom's (1971) *Taxonomy of Educational Objectives*. Bloom identifies six educational objectives ranked sequentially starting from the most basic, which is knowledge, and advancing through comprehension, application, analysis, and synthesis, leading to the most advanced, which is evaluation. Keywords can be used to describe learning objectives that are closely associated with each of the educational objectives. Table 1 summarizes Bloom's Taxonomy.

Creating learning objectives that can be associated with various levels of educational objectives can give rigor

Table 1: Bloom's Taxonomy

Knowledge *of terminology; specific facts; ways and means of dealing with specifics (conventions, trends and sequences, classifications and categories, criteria, methodology); universals and abstractions in a field (principles and generalizations, theories and structures)*: arrange, define, describe, duplicate, enumerate, find, identify, know, label, list, locate, match, memorize, name, order, outline, read, recall, recognize, record, relate, repeat, reproduce, select, tell, write.

Comprehension *Understanding the meaning of informational materials*: classify, compare, comprehend, convert, defend, describe, discuss, distinguish, estimate, explain, express, extend, generalize, give, identify, indicate, infer, interpret, locate, outline, paraphrase, predict, recognize, report, restate, review, rewrite, select, summarize, translate.

Application *The use of previously learned information in new and concrete situations to solve problems that have single or best answers*: apply, change, choose, classify, complete, construct, demonstrate, discover, dramatize, employ, examine, illustrate, interpret, manipulate, modify, operate, practice, predict, prepare, produce, relate, schedule, show, sketch, solve, use, write.

Analysis *The breaking down of informational materials into their component parts, examining (and trying to understand the organizational structure of) such information to develop divergent conclusions by identifying motives or causes, making inferences, and/or finding evidence to support generalizations*: advertise, analyze, appraise, break down, calculate, categorize, compare, contrast, criticize, deconstruct, diagram, differentiate, discriminate, distinguish, examine, experiment, explain, identify, illustrate, infer, investigate, outline, question, relate, select, separate, test.

Synthesis *Creatively or divergently applying prior knowledge and skills to produce a new or original whole*: appraise, argue, arrange, assemble, categorizes, collect, combine, compile, compose, construct, create, defend, design, develop, devise, evaluate, explain, formulate, generate, imagine, invent, judge, manage, modify, organize, plan, predict, prepare, propose, rearrange, reconstruct, relate, reorganize, revise, rewrite, select, set up, summarize, support, tell, value, write.

Evaluation *(On same level as synthesis?): Judging the value of material based on personal values/opinions, resulting in an end product, with a given purpose, without real right or wrong answers*: appraise, argue, assemble, assess, attach, choose, compare, conclude, construct, contrast, core, create, criticize, critique, debate, decide, defend, describe, design, determine, develop, discriminate, discuss, evaluate, explain, formulate, interpret, judge, justify, predict, prioritize, rate, recommend, relate, select, summarize, support, value, verify, write.

to the case evaluation process. Students will be required to demonstrate different levels of thinking skills from basic recall associated with knowledge through more robust critical thinking skills associated with discussion, application, analysis, development, and finally judgment at the highest level of educational objective.

Fink's (2003) Taxonomy of Significant Learning offers a slightly different structure of educational objectives. The levels include foundational knowledge, application, integration, human dimension, care, and learning how to learn. This format may be more useful in developing learning objectives for case studies that are interdisciplinary or may have a strong human orientation.

Every case will vary when it comes to developing learning objectives and its association with educational objectives. However, the fact that there is even the opportunity for this type of learning diversity in a case outcome makes such an assignment that much more valuable as a teaching tool.

INTENDED COURSES AND LEVELS

This section of the teaching notes is straightforward and self-explanatory. It is intended to give basic demographic information regarding the teaching audience of the case. As the section title implies, the author needs to list the specific courses and disciplines that most closely relate to the case. Also, the group of students for which the case is intended, from undergraduate to graduate, should be indicated. The author may also recommend where the case is best offered in the course sequence and/or what prerequisite knowledge is needed.

SUGGESTED TEACHING PLANS/APPROACHES

This section of the teaching notes is also self-explanatory. It focuses on the demographics of the teaching methodology. It also discusses issues such as whether the case is open-ended (no questions and students are expected to determine key issues and decisions on their own) or directed (a series of questions is provided to direct the students through the analysis process). The author should also indicate if the case has been classroom tested and the length of time needed to present the case. The author could also give teaching ideas learned from testing the case.

Sometimes case authors will give board layout, which is a way to set up and organize the case on the board to facilitate discussion of the case. This would include key topics and headings and some illustration of the flow of events.

Information may also be given on methods of case presentation from oral to written, individual to group, in class to online, role playing to examination.

RESEARCH METHOD

This is a third area of the teaching notes where demographic type information is given. The focus of this section is on the research process. Cases generally break down into two broad areas: field researched or decision-based cases and secondary data or descriptive based cases.

Field researched cases depend on personal observation and interviews with a real protagonist and organization where a decision dilemma is identified that becomes the basis of the case. These cases often involve sensitive and private information that could be detrimental to the case participants if made public. The author should indicate in the teaching notes the extent of any disguise in the case including names, location, type of company or industry, and financial or personnel records. It is also critical to obtain a case release from the case participants, although that information does not have to be presented in the teaching notes. The release is only for the case itself

Secondary data cases are based on already publicly available information and provide a description of the situation and events. A decision situation is not the focus of the case as that information is already available. The emphasis of a secondary data case is more to analyze the actions taken based on the information presented. These cases also require extensive citations from sources used to develop the case.

RELEVANT THEORY AND LITERATURE

The next phase of the teaching notes is the academic theory and literature component. This is the part of the teaching notes that gives academic rigor to the case research effort. The author can demonstrate knowledge and understanding of appropriate theoretical concepts and/or models which are critical to the issues identified in the case.

It is important to have at least some idea of appropriate theoretical concepts or models which are applicable to the case prior to the research and writing. This association to the case will aid the author in presenting case material in such a way that highlights the desired theory and its link to the practical issues and situations.

In the teaching notes, the author can present the theory, concepts, and models in a detailed fashion with appropriate citations. Key journal articles or other publications can be

addressed and related to critical case issues. If some theoretical concepts promote more than one opinion or position, this diversity should also be recognized in the teaching note.

This is the one section where the author can emphasize the link and applicability between the theoretical concepts and models and the practical application of a "real-world" situation. Such information can be very valuable to the case adopters as it will aid them in determining the desirability and usefulness of the case.

DISCUSSION QUESTIONS

If the author wants to promote a directed case, then a sequence of questions helping to flesh out the key issues and decisions in the case will need to be developed. It is possible to at least have some idea of potential questions before the case is written, and other questions can be developed during the writing process. These questions can all be subject to change and/or modification.

It is critical to link the questions to the learning objectives. Every learning objective should have at least one associated question. Frequently, the learning objective is listed by number following the question to insure the continuity. This association gives structure and credibility to both the learning objectives and the questions.

Questions need to be clear and concise and based on the facts and issues presented in the case. Students need to be able to satisfactorily answer the questions only from the case itself. The questions should focus on different levels of learning corresponding to the learning objectives. Bloom's Taxonomy can be a useful guide to identifying keywords to use in question development to promote desired learning and thinking skills.

It is beneficial to have a sufficient number of questions to allow the instructor to pick and choose the questions most appropriate to individual situations. Some instructors may choose to use none of the questions, and others may select questions that focus on a subset of issues presented in the case. It is possible that instructors may develop their own questions as well.

As important as it is to have questions listed in the teaching notes, it is equally as important not to list questions at the end of the case. Listing questions in the case can sometimes force the case in a direction that the case adopter may not want to follow. However, cases will often have implied questions in the case narrative, either at the beginning of the case in the section called the "hook" or at the end of the case in the summary or what I call the "catch" section. These questions generally are of a reflective nature

like: What should he/she do? Most of the time, this type of narrative can lead into an acceptable either open-ended or directed format of analysis.

ANSWERS TO DISCUSSION QUESTIONS

Personally, I think this section of the teaching notes is the most important. It is also the section that takes the most time to complete if the author wants to have a quality submission. I have rejected using more cases because of the answers to questions than for any other reason.

On the other hand, as the author, I have a greater opportunity to create superior teaching notes and case acceptance through the answers to questions than with any other section. Since I have the greatest knowledge of the issues of the case; understand the relevant theory, concepts and models; and develop the learning objectives and questions to fit the case, I should have the greatest ability to create complete and understandable answers to the questions.

When developing answers to the questions, it is important to consider the answers through the eyes of the user and assume that the user has limited knowledge and understanding of the issues and concepts. It is best to err on the side of providing too much information and detail in the answers. Use tables, charts, diagrams, and figures or any other visual presentations to help in illustrating answers.

In presenting models and/or numerical computations to support answers, illustrate step-by-step processes with precision and clarity how all answers are determined. Also, if tables or exhibits are included in the case, indicate how information from those documents are incorporated into official answers.

The answers to the questions can be the biggest marketing feature of the teaching notes. Adopting instructors do not want to spend a lot of time doing the work of the author and trying to solve the case and develop official answers. This is a teaching note feature that adopters will want the author to have clearly laid out and presented. What questions, if any, the adopters choose to use will be their choice, but a good solid effort in the answers by the author will present a favorable impression and a sense of confidence in the validity of the teaching notes.

These answers should be the longest and most detailed section of the teaching notes. Start each answer with a repeat of the question, preferably highlighted for easy reference. If a question has a number of sub questions, answer each sub question individually and in order. Reference relevant theories, concepts, models, and any other cited sources appropriately in the answer.

Most importantly, answer all questions using only information provided in the case. Do not make any assumptions. Also, avoid personal bias in any answers. It is important that the case itself is presented without bias, and the same holds true for the answers.

In some of the higher-level questions that center around synthesis or evaluation, recognize that there could be a number of correct answers depending on how the user interprets and analyzes the information. A great case is one that is presented in such a way that evaluators can easily arrive at several different solutions, each with supportive justification. The official answer should include a variety of possible correct answers with adequate validation for each answer.

In developing the answers, it can be just as important to understand how not to answer questions. What I find unacceptable are statements like: "Student answers may vary," or "based on an assumption." When numbers are involved, it is unacceptable to have a statement like "this number was a plug figure." Also, mathematical computations must be shown when used to reach a numerical solution.

The Golden Rule can apply when writing answers to questions. "Do unto others as you would have them do unto you."

EPILOGUE

The epilogue can be the most fun part of the teaching notes, especially for a field-based decision case because the user learns what happened. It can be even more of a "wow" factor if there is an element of the unexpected. What happened may not necessarily be the correct or best decision, but it can provide an extra teaching moment as it can help to illustrate the complexities of operating in a "real-world" environment.

REFERENCES, ATTACHMENTS, AND DISCLAIMER

There are three final what I would call "housekeeping" sections of the teaching notes: the references, attachments, and the disclaimer. In the reference section would be a bibliography. This bibliography could be especially extensive for a secondary researched descriptive case. Also, in this section would be any other recommended sources for additional reading, especially related to the relevant theory, concepts, or models addressed in the case.

The teaching note could include attachments that could be used at the instructor's discretion to aid in the analysis of the case. The attachments could focus on theoretical concepts and models, key individuals, timelines, organizational charts and structures, worksheet templates, or statistical or mathematical formulas or computations.

All publishers are going to require a disclaimer statement for both the case and teaching note. An appropriate disclosure for the Christian Business Faculty Association could be in the following format:

ADVANTAGES OF WRITING TEACHING NOTES IN A CHRISTIAN-BASED ENVIRONMENT

Essentially everything written to this point with respect to the development of the teaching notes can apply equally in a secular versus a Christian environment. However, there are distinct advantages and possibly some challenges when focusing on Christian-based companies and writing for Christian-based journals for use primarily in Christian-based universities.

The biggest advantage is all interested parties have a common bond: our Christian faith and beliefs. With that comes a common goal of training leaders to win the world for Jesus Christ. So, there is a vested interest by all parties to see this case research become successful and disseminated to the classroom and future leaders.

I personally have been in several joint ventures with leaders of Christian businesses where these individuals have gone out of their way and made considerable sacrifices to help me successfully complete my case research. While the teaching notes are more of an author-privileged document, the notes still cannot be completed without an acceptable and realistic case study and the cooperation of the Christian business leader.

Additionally, working with these Christian leaders and Christian journals has helped to build bridges between the theoretical academic community and the practical business community. The more opportunities we have to work together, the more we understand each other's needs and the more we can better equip and prepare our students for what lies ahead.

The biggest challenge is to do this research and writing with excellence. It is important to make the best effort possible and produce the best product possible to give our students the best opportunity for success.

CONCLUSION

When writing the teaching notes, think of yourself as the end user—an instructor wanting to adopt the case. What would you, the user, like to see in the teaching notes to help you be able to understand and present the case most efficiently and effectively? You need to convince your user that this is the best case and teaching notes available and close the deal. You only get one chance to make a good first impression.

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