

New Horizons: Case Writing and Teaching Comes to Counselor Education

Robin Guill Liles

This case describes a counselor educator's experiences as she learns about and tests the case writing and teaching method within a counselor education program. Traditional counselor education programs may be defined as set courses, usually requiring 40-50 hours of classroom instruction, followed by and concluding with several hundred hours of internship (practical) experience.

The case is intended to help counselor educators think about new and innovative ways of imparting some real-life flavor into the academic setting, thus allowing counselors-in-training to gain insights into the counseling process prior to final stages of their academic preparation (i.e., internship). Additionally, counselor educators responsible for training doctoral-level and future counselor educators could use this case to generate discussions about the counselor education process, as well as overall professional development.

The case may be presented in "sections," with relevant questions, activities, and discussions, or in whole. Characters are real; however, names have been disguised to protect confidentiality.

WHAT A WONDERFUL WAY TO TEACH! BUT CAN I MAKE IT WORK?

As she listened to the two business professors, Charlene White thought to herself, "What a wonderful way to teach!" The Case Writing and Teaching Workshop was offered through her university as a professional development activity; and as a newly-appointed assistant professor in the counselor education program, Charlene was eager to learn all she could about best teaching practices. She had signed up for the workshop even though she didn't know anything about case writing and teaching. In fact, Charlene had never heard of the case writing and teaching method before the workshop. Charlene listened to the business professors describe their teaching experiences, and she was struck by the real-life flavor she sensed the two women were able to bring to their classroom teaching. "This is what I've been looking for to help my students understand counseling in the real world," Charlene reflected. Then she sighed to herself, "But can I make it work?"

Prior to her coming into academia, Charlene was employed several years as a licensed professional counselor. Her experience had been largely in the area of mental health assessment, and she had worked almost exclusively in a hospital's emergency room. In that time, Charlene came to understand the profoundly worrisome nature of mental illness, and the many systemic difficulties which could undermine or even sabotage positive counseling outcomes. She often said to herself: "No one would believe this unless they saw it!" Charlene also recognized that though she was professionally committed to helping her clients, she wished her education had better prepared her for the clinical realities of professional counseling. So it was with this mindset that Charlene moved into the role of counselor educator.

At the conclusion of the first workshop, participants were assigned the task of writing a case embryo. The business professors reminded everyone that by definition a teaching case must be "real" – real names, real places, real timelines. Real! Charlene felt her excitement retreat. How was she supposed to write something that "real?" The counseling profession's ethical guidelines were clear. Confidentiality could not be breached.

Charlene left the workshop, head down, brooding about her dilemma. When she returned to her office, she quickly reviewed the counseling ethical guidelines, where she found information she already knew. Counselors or counselor educators reporting information gathered from clinical or real-life experiences must utilize disguises to protect client confidentiality. "Oh well, so much for my 'real' embryo," deadpanned Charlene.

WOW! THESE PEOPLE ARE COOL!

For the next few days, Charlene thought about the embryo assignment, and she wondered about the possibilities case teaching and writing might bring to her counseling classroom. She couldn't escape the feeling that she was missing a great teaching opportunity. Plus, it was not in Charlene's nature to quit. "This idea is too good," she said to herself. So Charlene wrote her embryo, disguises and all, and submitted it to the workshop professors for review. Charlene was subsequently invited to present the embryo at a regional conference. She was delighted!

At the conference, Charlene met other academicians who had been writing and teaching by the case method for years. "Wow!" Charlene smiled to herself. "These people are cool!" She presented her embryo to the group and received suggestions about ways she could expand the embryo into a full case. David Jeffreys was a professor in educational leadership, and he took particular notice of Charlene's embryo, asking if she had implemented disguises. Charlene nodded, dreading the next comment she knew was bound to come. David went on to explain, "Other groups in the helping fields have used case method teaching in the past, but have had only limited success because case writing experts gener-

ally take a dim view of disguises. They think disguises slant the case content, or even distort case content so much that the case almost becomes a piece of fiction.” Charlene knew that what he said was true.

Later, Charlene and David continued their discussions. She explained to him that she was reluctant to give up on the case method as a way to teach counselors-in-training. “If nothing else, my field experience taught me that there can never be too much preparation for counseling work. Even with disguises, the case method teaching just *feels* like another way to prepare future counselors.” David asked Charlene to think about the likelihood she could write a case, disguising certain real-life aspects of the case, protecting not only confidentiality *and* the clinical truthfulness of the case, but the integrity of the case writing and teaching method. Charlene nodded, responding, “There’s got to be a way.”

YOU CAN’T BEAT EXPERIENCE!

Charlene and David agreed that she was ethically prohibited from adhering to the true definition of case writing (i.e., including only documented facts) and that if she wrote a case study she would have to implement disguises. Charlene and David reasoned that the “secret” to maintaining case integrity and to insuring client confidentiality could rest with the case components chosen for disguise. “Plus, from my practical experiences, I know cases!” Charlene offered. “It seems reasonable that I could choose where to insert or implement disguises, without harming either client confidentiality or case truthfulness.”

THE CLASS

Charlene left the conference resolved to carry out her plan to use the case writing and teaching method in one of her classes the following semester. She figured that at the very least her students would enjoy the novelty of learning by case method. She further surmised that any nagging ethical concerns could be offset by the reality that as counselors-in-training, students are also technically held to the profession’s confidentiality standards. Charlene rationalized that between thoughtful case writing and careful implementation of disguises, as well as student adherence to ethical responsibilities, the case writing and teaching method could find a home in one of her counselor education courses.

The Council for Accreditation of Counseling and Related Educational Programs (CACREP) requires students in graduate counseling programs to take a course in professional orientation and ethics. Charlene was slated to teach the professional orientation and ethics class, and she chose to write a case for the class. She developed the case in three parts, to be disseminated to students over a six-week period. From the workshop, Charlene learned

that an important component to case writing and teaching was class discussion, so she dedicated three class periods to case development, including small and large group work.

Thirty-two students were registered for Charlene's class. From the outset, students stated they were uneasy about the assignment, particularly when they realized the case study comprised 30% of their final grade. Students' discomfort partly appeared to come from their concern that the case teaching method would be difficult to implement with so many students. They also stated they were confused about the case teaching method and learning objectives. Charlene could understand this uncertainty because she knew that master's level counseling students typically defined "case study" as a research method, not a teaching method. In addition, it seemed reasonable to wonder about effective teaching and learning with a large class enrollment.

Charlene reviewed the syllabus on the first night of class. She explained to the students that in order for them to complete the case study assignment, they would work in three modes: individual, small, and large groups. When working in individual mode, students were asked to spend at least four-to-six hours per week thinking about, or researching answers to, the professional and ethical dilemmas they discerned in the case. Charlene went on to say that she had limited availability to dialogue individually with students, and expected them to grapple alone with their case studies as part of their preparation for small group work.

Charlene then randomly assigned students to small groups, four students per group. Three small group meetings – or eight hours of class time – were written into the course calendar. When students were meeting in small groups, they were asked to identify a process observer. The process observer was defined as a group member who was responsible for insuring that the group clearly identified working goals at the beginning of each small group meeting, and stayed on task to obtain these goals. The process observer varied from meeting to meeting, and at the meeting's conclusion, the process observer was responsible for "signing off" for group members. Charlene explained that "signing off" meant that the group maintained good practices.

At the conclusion of classes dedicated to small group work, Charlene conducted large group discussions or debriefings. During this time, students were encouraged to share their views about the case method, and how effective they perceived the method to be as a teaching and learning tool. Large group discussions lasted approximately 30-45 minutes.

At the end of the fourth class meeting, Charlene handed out Part A of the case study to the students. She instructed students to read and ponder the case throughout the next week. To support students in this challenge, and to facilitate their individual processes, Charlene provided students with a worksheet. She stated that worksheets were intended to en-

hance student understanding of the case study, as well as boost small group productivity the following week. At the very least, Charlene surmised that completing worksheets would help students begin noting their preliminary responses to the case, and that this note-taking would go far in helping students write their case study final draft. Charlene also asked students to *evaluate themselves* on case development prior to coming to the next class. Charlene's rationale for having students grade themselves was to encourage individual due diligence and optimal individual preparation for small group work. She explained to students that they would be expected to share their self-evaluation grades with other group members the following week.

The next week, students spent two hours of class time in small group work. During the last 10-15 minutes of the first small group meeting, Charlene directed students to discuss self-, group member and group evaluations. Students were to begin by reporting their self-evaluation grades. Then the group as a whole was responsible for evaluating each group member for his or her small group work contribution. Charlene rationalized that asking group members to grade one another encouraged students to understand that counseling professionals must not only engage in best practices themselves, but insist on same from their colleagues. Finally, group members were asked to assign themselves a group grade. Charlene required students to give themselves a group grade in order to have students simultaneously experience feelings of personal and professional responsibility, combined with group integrity.

In the last half hour of the first class dedicated to case development, Charlene and students discussed the case study, including the case method process. At first, students were quiet. Then one man spoke up, saying "I didn't know what to expect tonight. I felt uneasy about the small group work. I guess I came to class planning to go along with the group, and then go home and do my own thing. But I think I'm changing my mind. My group members have really helped me understand the case. It's a complicated case, and tonight I realized that 'two heads really are better than one.' I guess I was a bit over confident." Another woman spoke up, saying, "I wasn't sure what to expect either. When I first saw 'case study' on the syllabus, I was thinking more of a research project. When I was reading Part A this week, I realized there were huge gaps in my understanding. All week, I've been thinking about how I was going to get this assignment done. It's such a huge part of our grade. I feel a little better after tonight, but I'm still pretty confused. I know I have a long way to go." Charlene noticed that the other students were nodding their agreement. She countered with, "Well, there's a dynamic component to learning through the case method. It's 'real-life' in that cases are fluid, and there can be a lot of confusion sorting through the case." Charlene concluded the class by passing out a list of her teaching questions. She explained to students that as they drafted the first section of their case study – *Response to*

Part A – they should think about their answers to the teaching questions, and to weave these answers into the notes taken from small group work.

The following week, Charlene conducted class in traditional lecture style. At the end of the class, she passed out the case study's Part B. Again, she directed students to work independently during the next week. When students returned the following week, they once more engaged in small group work, including self-, group member, and group evaluations, as well as large group discussions. At the conclusion of class, Charlene distributed her teaching questions for Part B. This pattern persisted through classes scheduled for the following two weeks, including the dissemination of Part C. Throughout this time, students were reminded to maintain good case notes to facilitate their case study final drafts. Charlene rationalized that asking students to keep "real time" case notes would help them gain greater understanding of the dynamic and fluid nature of both the case study *and* counseling process. In other words, in their final drafts, students would be expected to demonstrate how their case conceptualizations, including their perceptions of related professional ethical dilemmas, changed over time.

When students handed in their case study final drafts, Charlene reminded them that the case study was worth 30% of their semester grade. She noticed that students appeared to remain uneasy about the case study. One student's remark seemed to sum it up: "This has been one of the most confusing, yet thought provoking, assignments I have ever been given in graduate school."

First, You Look at the Risks, and Then You Look at the Benefits!

As Charlene reflected on the case method and her professional orientation and ethics class, she noted that students seemed to engage in the required activities, and to work diligently on their case studies. But she also remembered several notable moments when the collective student message appeared to be – *this is too much and too confusing!* In fact, Charlene had to admit to herself that at times students seemed outright alarmed. She wondered if during those times students found her response to their confusion to be unhelpful, if not plainly annoying. Her "hands off" approach and her explanation that a certain degree of confusion should be considered "normal" seemed to provide little if any solace. Towards the end of the semester one student spoke to Charlene, telling her, "At first I was so confused about the case study. But as the weeks passed, I sort of began to see what you were attempting to do. You wanted us to think for ourselves."

In the early stages of case development, almost every student communicated to Charlene that they were put off by being randomly assigned small groups. Charlene indicated to the students that she believed random assignment best insured groups would have a "good mix." She went on to explain that she believed "strength attracts strength," and that weaker

or more fragile students can flounder when establishing a positive group connection. Charlene shared with students that this particular dynamic has implications for a class with large enrollment. Over time, students came to express their appreciation for their group assignments. One student wrote: "I had the wonderful opportunity to work and talk with classmates that I might have not spoken to. I believe it is essential for us to be pulled from our comfort zones and put with people who are different than we."

Though Charlene included her learning rationale for the case study in her syllabus, students appeared to struggle to understand the case teaching method. They seemed to experience some frustration with the on-going nature of the case study process. Charlene could see that they wanted to complete the assignment quickly and that extending the process over a six-week period was trying for them. At the conclusion of the assignment, one student stated, "When you gave me Part A, I wasn't sure what you expected from me. I found Part A to be a real challenge, but I was proud of myself for getting my response written. Then, I received Part B, and I thought, I'm never going to get this case study done. I had so many questions. But as I worked with my group, my understanding improved. The case study seemed to give me a chance to role play being a counselor, making real decisions about a client. I found that working with my classmates provided me with the opportunity to gain valuable insights and come to conclusions that I don't feel I could have reached on my own."

A NEW HORIZON

That winter break, Charlene reflected on her professional orientation and ethics class, and as she reviewed her journal notes, it came to her that some of the finest student learning was not what she'd anticipated. Yes, she felt her implementation of the case method had been adequate, and she believed students had fared well enough. But that semester, the student who learned the most was Charlene. She thought about the case writers and teachers she'd met at the workshop and conference in the previous year, and Charlene understood that it had been their words of instruction and encouragement which carried her forth as she crested her new teaching horizon.

ADDITIONAL READINGS

Barnes, L. B., Christensen, C. R., & Hansen, A. J. (1994). *Teaching and the Case Method* (3rded.). Boston, MA: Harvard Business School Press.

Lawrence, P. R. (1953). Preparation of case material. In *The Case Method of Teaching Human Relations and Administration*, (K. R. Andrews, ed.). Cambridge, MA: Harvard University Press.

Remley, T. P., & Herlihy, B. (2001). *Ethical, legal, and professional issues in counseling*. New Jersey: Merrill Prentice Hall.

Ugboro, I. O., Grigsby, D., & Brewer, B. (2004). Necessary elements of a good teaching case. In *Proceedings of Southeast Case Research Association*, (I. S. Ugboro, ed.). pp. 43-48.