

Making the Most Out of Case Studies

Christina A. Clamp
&
Innocentus Alhamis
Southern New Hampshire University
August 3, 2005

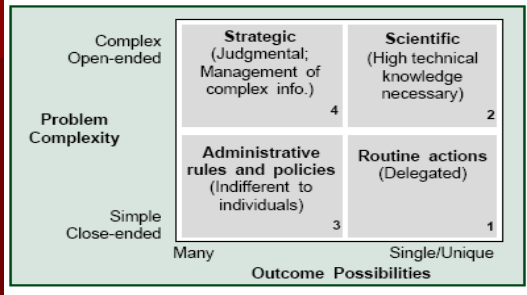
The Use of Case Studies

- I. To build critical thinking skills for management practice in cooperatives
 - To simulate the real world conditions inside a 'controlled' environment of a classroom whereby a range of discussions would take place to understand the complexities of decision-making and their intended and unintended outcomes.
 - To illustrate alternative managerial choices.
 - To allow groups to discuss complex problems through a simulated example when they do not have shared experiences to process.

The Use of Case Studies

- Case studies facilitate the teaching of management issues in cooperatives since much of the management literature is focused on conventional business settings.
- When cases are generated out of participants' experiences, the content is focused and specific to their setting.
- Cases allow participants to process experiences with a group of peers.

Figure 1: Framework for Problem-Outcome Linkages



Management Education and Case Method as a Pedagogy
 Arun Kumar Jain

The Use of Case Studies

- To build theory about cooperatives
 - Case studies can
 - Provide description
 - Test theory
 - Generate theory
 - Within case analysis
 - Cross case comparisons

Case Study Method

- Traditional Case studies
 - May expose participants to case material that is outside of their experiences
- Learner generated case studies
 - Write your own roleplay and applied case study
 - Has the advantage of contextualizing the learning in terms meaningful to participants

Learner Generated Cases

Case #1 Board Characteristics

List out the characteristics of your board

Be sure to indicate in your list:

1. Number of board members
2. Characteristics of the people on the board
3. Term of office
4. Election procedure
5. Primary function
6. Specific duties of the board members
7. Role of executive officers
8. Frequency of board meetings

Case # 1

- Facilitates the discussion of boards by working from the case specifics of participants' boards.
- Allows the session to be more specific to the boards of the participants.
- This list often surfaces points that can be reflected upon while presenting the course content.

Learner Generated Cases

Case #2 Board Structure & Effectiveness Questionnaire

Board Structure & Effectiveness Questionnaire

- Let's discuss your answers to the questions in the "Board Structure & Effectiveness" questionnaire

Board Structure & Effectiveness" Questionnaire (Adapted from Management Consulting Services Questionnaire)

- As a Board member, what do you see as your responsibilities to the organization?
- What are the responsibilities and roles of the staff?
- How many members sit on the Board of Directors?
- How is the Board structured? Are there any committees or functional groups on the Board? List the committees on an organizational chart, which indicates who they report to in the organization.

Board Structure & Effectiveness"
Questionnaire (Adapted from Management Consulting Services Questionnaire)

- How are potential new board members
 - Identified?
 - Recruited?
 - Oriented?
 - Retained?
- How many new members have joined the board in the past two years?
- How many old members have retired from the Board?

Board Structure & Effectiveness"
Questionnaire (Adapted from Management Consulting Services Questionnaire)

- How many of these left the board before their term expired? Why?
- Is there a rotation policy for Board members? How does it work? Is it enforced?
- How often does the Board meet?

Board Structure & Effectiveness"
Questionnaire (Adapted from Management Consulting Services Questionnaire)

- In the past year, have you met without a quorum? How often? How many members make a quorum on your board?
- Who sets the Board agendas?
- Is the background information needed to make informed decisions distributed to the Board prior to the meetings and in sufficient time to allow for careful study?
- If so, what does the Board information package look like?

**Board Structure & Effectiveness”
Questionnaire (Adapted from Management
Consulting Services Questionnaire)**

- If not, what information is needed and by when?
- How are tasks assigned to the Board?
- Are minutes of the meetings kept?
- Are Board members given job descriptions and a list of expectations? If not, how are these communicated?
- Does the Board review all major contracts and sign off on new projects?
- Do the Board members review the financial reports and discuss them?
- Are the Board members knowledgeable of credit union philosophy and regulations?
- Does the Board set a yearly fundraising goal for itself? If so, is it successful?

What is an effective board?

- Brainstorm/discussion

1. Each of you should jot down areas in which your board could become more effective.
2. Discuss your ideas in a small group to further refine them.

Case #2

- This case exercise allows participants to develop a case from the questionnaire.
- Participants present their case on flip chart paper.
- They then critique each other's organization.
- The final step is to identify steps they can take to strengthen their board.

Case #3 Traditional Case MONDRAGON CORPORACION COOPERATIVA



MCC: Traditional Case

- The use of MCC serves to motivate and inspire people who wish to develop cooperatives.
- The case presentation can be done with a video about Mondragon or with material about the cooperatives in a Powerpoint presentation.
- The MCC case is a good one for groups who might question whether cooperatives can be successful on a large scale.

Case #4: Carpet One

- Indepth teaching case
- This case provides specifics about the development of the cooperative which may educate others about the development process.
- Provides specific details about the co-op model
- A study guide is included for guiding group discussion.

Case #5 Traditional Case for Introducing a Group to Types of Cooperatives utilizing the Internet

Artist Cooperatives

- Typically organized as leasehold or limited-equity cooperatives specifically for artists and art studios, artist cooperatives are a method of ensuring permanently affordable combined workspace and housing for artists since often artists' communities experience gentrification. **Artspace** in Minneapolis has been one of the main groups involved with developing artist cooperatives.

Conclusions about Case Studies of Cooperatives

- There are a number of resources for case studies of cooperatives – published articles; film and websites.
- Case studies can introduce newcomers to types of cooperatives.
- Case studies can serve as a tool for others in designing their own cooperative.
- Case studies are useful for deepening our understanding of the management issues and how people interact in cooperatives.
- Cooperative case studies are useful in building our theoretical understanding of cooperatives.
