

CASE TEACHING WORKSHOP:

INSTRUCTOR'S GUIDE

These materials were developed by J. A. Austin and Associates for a workshop sponsored by the Family Planning management Training Project to train trainers to use case teaching methodology.

**CASE TEACHING WORKSHOP: INSTRUCTOR'S GUIDE**

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## 1. INTRODUCTION TO MANUAL

The purpose of this manual is to provide guidance to instructors for the design and implementation of a workshop on the case teaching method. The manual provides this guidance in the form of documentation of a case teaching workshop held March 16-19, 1987 for trainers working with the Family Planning Management Training (FPMT) Project. These trainers will be using case studies in their training activities and will be involved in developing other trainers' capacity to use the case study method of instruction. This manual aims to be of assistance in carrying out such training of trainers. Each workshop for trainers, of course, should be tailored to the specific needs and circumstances encountered in that situation. Consequently, the guidelines and examples presented in this manual should be viewed as a resource to be drawn on in the design of each new workshop rather than a rigid.

In the next section we will discuss the key elements in workshop design: objectives, substance, pedagogical process, sequencing, and administration. In the final section we will discuss in detail each of the workshop's sessions: introduction to case teaching, the learning contract, teaching skills: questioning and listening, discussion dynamics: direction and control, teaching practicums, mini-cases, and the summarizing collective forum. The appendices and the accompanying books contain the materials used by the instructors and the students in the FPMT workshop. To get maximum benefit from this manual, we recommend that the user first read the materials used in the workshop and referred to in the subsequent text. Appendix A contains the assignments. The assigned case studies and readings are found in the accompanying books and in the manual's appendices.

The faculty for the workshop was Dr. Mary Anderson, Dr. James E. Austin, and Dr. Catherine Overholt.

## 2. WORKSHOP DESIGN

### 2.1 Objectives

The workshop had two basic objectives:

\* to increase the participants' understanding of the case method;

\* to develop further the participants' case teaching skills.

It should be noted that all of the workshop participants were familiar with case studies, although only a few had actually taught with them. Most of the participants were experienced trainers and very interested in learning more about this pedagogical method and in gaining a capacity to utilize case studies in their future training activities within the FPMT Project and beyond. In addition to FPMT consultants and staff, there were representatives from four regional training institutions in Asia, Africa, and Latin America. Approximately half of the participants had received prior training in case writing, so the workshop had no objective nor content regarding case writing and development. If such experience is not present, one should incorporate it as an objective. One cannot fully understand case teaching unless one understands the nature of case studies.

## 2.2 Substantive Themes

The substance of the workshop focused on three general themes: educational philosophy, skills, and application.

(1) Philosophy - Case study teaching is more than a technique; it is rooted in a set of beliefs about the learning process. Briefly, these beliefs set forth that (1) the fundamental objective is to develop thinking capacity and the ability for analytical problem-solving and decision-making rather than the transmittal of information; and (2) to obtain this objective, active student involvement in the learning process is more effective than passive or unilateral forms of teaching. The exploration of this educational philosophy involved the examination of concepts concerning the roles and relationships of students and instructors, and in particular the concept of a learning contract.

(2) Skills - At the core of the workshop were the identification and analysis of certain skills which are central to the case teaching process. Emphasis was placed on the trilogy of questioning, listening, and responding. These are the primary "tools" for the discussion leader. The what, how, when, and why of using these tools were examined. Other techniques for managing the direction and control of the discussion process were also analyzed.

(3) Application - The final focal point of the workshop was the application of the concepts and skills developed in (1) and (2). This was done through teaching practicums by the participants and through diagnostic analyses of these and other teaching sessions. The workshop had an applied rather than a theoretical orientation. Therefore practice and the examination of discussion techniques were central components of the workshop.

### 2.3 Pedagogical Process

The workshop objectives cited in 2.1 above drove the design of the pedagogical process. The workshop aimed to increase understanding of and skills in case teaching. Based in part on the premise that "experience is the best teacher," we used the case method as the most effective way to learn about the case method. Thus, we created, from the beginning, multiple levels or "windows" through which the participants could view the case process. They were experiencing the case method learning process as students while simultaneously witnessing the instructors use this method. In some instances the case studies concerned problems encountered by case teachers, thus adding another level, that of case teachers discussing with students of case teaching the teaching problems of other case teachers. This multiple, simultaneous immersion into the case method process magnified the opportunities for learning about case teaching from distinctive perspectives.

We made these multiple "windows" explicit through the use of debriefing sessions which served to analyze the case discussions they had experienced that day. These debriefings revealed how the instructors used various tools and the resultant effects on the dynamics of their own discussion. This was an effort to make more transparent the teaching process, as contrasted to the subject matter which had been the focal point of the case discussion. This allowed the participants to reflect again on the discussion they had just experienced as students, this time from the perspective of the instructor. These debriefing sessions also were used to launch discussions about the various tools from a general perspective rather than being tied to the specifics of the case. In this way the general applicability as generic skills for discussion leadership was reinforced.

The other design consideration related to the pedagogical process was the need to develop very early on a trusting relationship between the instructors and the participants and among the participants. Closely related to this was the need for the participants to become quickly and intensely engaged in the process with a willingness to venture forth, to take risks. This required the creation of a supportive environment. Thus, in the initial sessions we had the goal of getting everyone to participate in the discussions, and being very encouraging in response to their contributions. This process can be facilitated by knowing ahead of time as much as possible about the participants so that you can draw on their expertise or interests in the discussions as well as establish a rapport with them in the informal interactions outside of the discussions. The debriefing sessions are also aimed at legitimizing the process of scrutinizing the instructor's teaching process. By applying it to ourselves first, we hope to show the utility to the instructor.

of feedback and to reduce their anxiety about the scrutiny they would undergo subsequently in their teaching practicums.

Another design element on the process side is the use of study groups. We assigned the participants to study groups on the initial evening. They used these groups to discuss the case studies after they individually analyzed them but prior to the plenary discussion. Study groups are commonly used in case workshops. They improve preparation, create participation opportunities for those individuals who feel more comfortable speaking in smaller groups, and allow social cohesion. These groups also become the support team for the subsequent teaching practicums. Groups of 5-7 are reasonable. Their composition should generally be internally heterogeneous but homogeneous across the groups.

#### 2.4 Sequencing

The sequence of the topics and materials should be shaped by both substantive and process considerations. The detailed sequence for the FPMT workshop is presented in Appendix A. From the substantive side the approach was to build an initial understanding of the philosophy and approach, followed by a more intensive scrutiny of specific teaching skills, building to an application of the understanding and skills in the practicums, and ending with summary and reflections. From the process side we wanted to immerse them immediately into the case method with two cases on the first day followed by a debriefing. The case-debriefing sequence was reiterated the second morning for process reinforcement as well as substantive extension. Next, we moved into the practicums, which was part of the process of increasingly shifting the discussion leadership responsibility from the instructors to the participants as the workshop evolves.

#### Administration

An exceptionally well-designed workshop can be rendered ineffectual by inadequate attention to administrative matters. A few items meriting special comment follow:

\* Classroom - The tables should be organized into a U-shape to enable everyone to see each other. Several blackboards and flipcharts should be placed at the front of the room visible to all. Make sure that quality chalk is available (or bring your own).

\* Meals - Service for coffee breaks and meals should be quick so as to avoid delays which can disrupt the schedule; buffets work well, and a la carte invites disaster.

\* Lodging - If the participants can be lodged at the same place, you increase opportunities for interaction and cohesion.

\* Materials - Make sure copies are made up in advance; double check completeness and order prior to distribution to participants.

\* Messages - Have messages delivered to participants after, not during, sessions.

\* Name Tags - Use lapel tags as well as larger cards at their positions in the classroom to help everyone get to know each other quickly; instructors should memorize names and backgrounds prior to workshop.

### 3. SESSION GUIDELINES

In this section we will describe in detail each of the main sessions held in the FPMT case teaching workshop. The sessions are indicated in the schedule in Appendix A.

#### 3.1 Introduction to Case Teaching

This introductory session was brief and began the morning of the first day. Alternatively, one could hold it the evening before after an opening dinner. Given that the case teaching workshop was a module within the larger FPMT workshop which had its own opening agenda, we did not use a prior gathering. However, we did begin our contact with the group indirectly through a memo aimed at providing an initial orientation toward the workshop and indicating the first reading assignment. This memorandum is found in Appendix B.

The workshop teaching team arrived in the classroom early to be able to greet the participants as they arrived and more readily attach faces to the names that we had already memorized.

The remarks at the introductory session were aimed at beginning the creation of a positive and supportive learning environment, a sense of collegiality and a collective undertaking rather than a hierarchical teacher-student relationship. In addition to communicating this perspective, we stated the objectives of the workshop as delineated in 2.1 above. We then briefly previewed the content of the workshop mentioning the topics and case studies we would be covering and the teaching practicums we would engage in. The study groups had already been assigned as part of the larger FPMT workshop agenda and so we simply described their function as mini-discussion forums for the cases and as teaching groups for the practicums. In effect, we were creating a learning contract with the workshop participants in terms of the goals, scope, and process of our

undertaking.

We stress the rarity of the opportunity that we, collectively, have as professionals involved in training to come together to learn from one another about the art and science of teaching and the special challenges and richness of the case study method.

The previous night's assignment included two readings along with the first case study. The two readings, "Teachers Also Must Learn" and "Because Wisdom Can't Be Told," are classic expositions on the philosophy and pedagogy behind the case method. These are not discussed explicitly in subsequent sessions but are aimed at providing them with an overview which is illustrated by the actual case discussions they will experience. The first reading is found in Teaching and the Case Method (hereafter referred to as TCM) by C.R. Christensen and A. Hansen (pp. 60-67) which was given to the participants and accompanies this manual. The second reading is attached as Appendix C.

### 3.2 The Learning Contract

The first topic area is the learning contract. This concept concerns the goals, expectations, and roles of the instructor and students in the learning process. The idea is that there exists a "contract" between instructor and students regarding the terms of these elements, albeit implicit rather than explicit. By managing this phenomena as an explicit variable in the learning process, an instructor is better able to manage the discussion dynamics.

The first case study, "The Offended Colonel" (TCM pp. 131-132), is aimed, in part, at dealing with the issue of the learning contract. A teaching note for this case is found in the instructor's guide to TCM which also accompanies this manual. This is a case series. The students read and discuss the (A) case and then the (B) case describing what the instructor did was handed out during the latter part of the session and discussed. The (B) case is found in Appendix D.

This case permits a discussion of many issues and these are delineated in the teaching note. We emphasized the learning contract aspect and guided the discussion to address the following more general questions: What should the content of a learning contract be? How should it be established? When should it be set? When should it be changed? Where should it be set? With whom do you establish it?

From the process side our objectives in the first case discussion is to try to get at least 80% of the participants into

the discussion. Early and broad involvement is important. One must avoid letting a small number of individuals dominate the discussion.

### 3.3 Teaching Skills: Questioning & Listening

The second theme deals with the critical tools of the discussion leader: questioning, listening, responding. The case study assigned was "Assistant Professor Graham and Ms. Macomber" (TCM pp.158-159). As is noted in the schedule, the participants read this case along with a reading on "Active Listening" (TCM pp.166-174) and then the plenary discussion session was held. Time permitting, a study group session could again be used.

The teaching note for the case is included in the TCM instructor's guide. Our emphasis in the discussion is on the nature and effect of professor Graham's questioning. This can be effectively explored by having two students role play Graham and Macomber and their dialogue as set forth in the case. After each question one can ask what was Graham seeking and after each response by Macomber one can examine the effects of the question. This is also a series case with (B) and (C) cases which were distributed and discussed during the session.

The debriefing session followed the Graham-Macomber case and was the last session of the first day. This session can be used first to analyze the topic areas, particularly questions, as a way of distilling out and generalizing on this key skill area. The discussion question is: what different types of questions are there and what purpose does each serve in the discussion process. The following categories are likely to emerge:

(1) information-seeking (what?) - used to get factual data into the discussion as the basis of carrying out further analysis and to develop skills in observing and determining critical details; an overreliance on this descriptive type of question, however; carries the risk of students simply regurgitating case facts rather than using them as the basis for analysis;

(2) analytical (why?) - used to seek depth, causality, explanation; this is key to stimulating the problem-solving processes and capabilities;

(3) evaluative (how good...?) - used to provoke judgements which then should be supported;

(4) action (what to do?) - used to develop decision-making capacity and an implementation orientation;

(5) predictive (what will happen?) - used to foster projective thinking and the implications of current actions or

trends;

(6) abstract (what lessons?) - used to move the level of the discussion from case specifics to more generalizable lessons or issues;

In addition to the above there are various types of process questions aimed at facilitating the discussion. For example, clarification questions to ensure that the meaning of a response was communicated clearly; linking questions to see if students are able to relate their point to some earlier point in the discussion; conflictive questions aimed at setting up a debate between to opposing points.

After leading this general discussion on questions and highlighting the options and importance of planning questions as part of the teaching process preparation, we illustrated the use of questions based on the two case study discussions they experienced during the day. This was done by presenting to them the types and numbers of questions used in each of the sessions. These had been recorded by the teaching team members who were observing during the sessions. The observed question patterns are presented and the participants are asked to interpret them. This provides the basis for understanding the functions of questions. This debriefing served to reveal that the teaching process is amenable to systematic observation and planning, i.e. the science side of the process, and therefore a learnable set of skills.

We also presented data on the participation frequency and breadth of the students, thereby highlighting the importance and observability of this element; this also served as a stimulus for further participation.

### 3.4 Discussion Dynamics: Direction & Control

This topic moves from the specific questioning and listening skills to the more integrative tasks of directing and controlling the discussion and the challenge of achieving an appropriate balance between these two aspects. The case that the participants prepared in the evening for discussion the next morning was "Ernie Budding A & B" (TCM pp.147-154). The teaching note is included in the TCM guide.

This plenary discussion was followed by a debriefing session which was used to discuss the range of responses and actions, other than questions, that instructors can employ to direct and control discussions. These include verbal and nonverbal mechanisms. On the verbal side the following are among the possible response types:

(1) echoes - these are brief, condensed references to a student's contribution, sometimes no more than a few words; they serve as acknowledgement and understanding, thereby generally have the effect of encouraging participation; they also can be used to emphasize the point being made;

(2) interpretation - the instructor's response here is greater than an echo and can involve some elaboration or distillation of the student's remark; this may be particularly useful where the comment might have lacked clarity or was particularly lengthy or merited a distillation to draw attention to a particular aspect;

(3) linking - this points out the relationship of a comment to either a previous comment or concept in the discussion at hand or in an earlier session; the purpose is to increase the coherence and cumulative learning of the discussion process(es);

(4) transitions - here the instructor is shifting from one topic area in the discussion to another; one needs to plan for such transitions and mold them into the discussion flow at the appropriate time;

(5) summaries - these can occur within a discussion either as a transition mechanism or to create focus when the points have been disparate or particularly complex; they can also be used at the end of a discussion;

(6) directives - these are instructions by the teacher indicating desired process actions, for example, stating that the discussion can focus on a certain topic or postponing the examination of some aspect or setting up role playing, etc.;

(7) information-giving - generally a discussion leader does not give information or enter into a lecture mode, but sometimes additional information not available in the case can be provided in order facilitate further discussion.

On the nonverbal side, some the instructor's instruments are the following:

(1) body language - facial expressions, hand and eye motions, and body movements can all be used to encourage, discourage, control, and direct the discussion;

(2) blackboard - how and what one records on the blackboards also is important to the management of the discussion; having a blackboard plan ahead of time is useful, i.e. projecting how the discussion might go and how the board might be organized; the actual discussion will always be different than the planned but the planning facilitates the management of whatever emerges;

writing clearly and distilling key points become considerations in board management;

(3) written instructions - the assignment of study questions is a means of directing the discussion because it is structuring the preparation and therefore the input into the discussion.

The debriefing session can discuss these foregoing general topics. We once again provided an empirical count of questions, nonquestion responses, and student participation frequencies to show how these elements can be observed and analyzed.

### 3.5 Teaching Practicums

The first teaching practicum used a teaching situation case, thereby removing any need for specific expertise in some topic area. This case, "The Section Just Took Over" (TCM pp.184-186), did, however, concern a teaching situation involving the marketing of birth control mechanisms, thereby making it more relevant substantively to the FPMT project. The second practicum used one of the cases written as part of the FPMT case writing effort, thereby having the double benefit of testing the new case out in a classroom situation and giving the trainers exposure to the type of case materials that will be available to them for their future FPMT workshop efforts. This case, "Community Distribution Reports," is included as Appendix F.

All of the study groups prepared the cases as if they were going to teach them. Then one group was chosen by lottery each time. The group decided which of their members would lead the discussion but all helped develop the teaching plans. After each practicum a debriefing session was held led by one of the workshop instructors. It is not easy for the participants to undertake the teaching or the debriefing so it is important to create a very supportive environment. One way to do this is by beginning each debriefing session with a round of applause for the teaching group's effort.

To start the debriefing we let the practicum discussion leaders comment on their experience. This self-reflection is an important capacity to develop and by speaking out first they are not immediately subjected to critique's by others. In handling the comments of the practicum teams and the other participants, the instructor should strive to find positive aspects of their efforts and to deal with weaknesses not as personal traits but rather as generic teaching issues which are applicable to all. From the process side, one objective is to motivate the participants to want to continue using the case method. The members of the practicum teaching teams who did not lead the discussions observed the session and documented the question and participation patterns using the methodology we had illustrated

in our earlier debriefing sessions. We had not instructed them to do this, rather they were applying the technique because of its perceived utility as a diagnostic feedback mechanism for teachers.

### 3.6 Mini-cases

After the practicums we dedicated one session to the analysis of specific teaching problem situations described in two one page cases. This was a way for them to apply their diagnostic skills. Also, these were problem situations which we had actually experienced in previous workshops and so we wanted to legitimize again the idea of learning from one's own teaching experience. The mini-cases are found in Appendix G. We also assigned two additional readings from TCM in preparation for this session: "Seven Questions for Testing My Teaching" (pp.123-124) and "The Dreaded Discussion: Ten Ways to Start" (pp.211-216).

### 3.7 Collective Forum

This final session was used to allow the participants to express their perceptions as to insights and thoughts regarding the case study teaching process. It was also used to identify and discuss aspects that were either not covered previously or that warranted further elaboration. One could also use this last session to identify next steps. This function was largely carried out in the subsequent final session of the larger FPMT workshop. In general, one would seek closure to the case teaching workshop by communicating a message of encouragement, collegiality, and continued commitment to excellence in the exercise of our shared mission of teaching and learning.

\* \* \*

As a final comment on the use of this manual we make reference to the accompanying video tapes. These tapes are of some of the sessions and were filmed with the limitation of only one camera without any special audio or lighting facilities. Consequently, they do not capture the fullness of the teaching process, nor should they be used for instruction in lieu of actual discussion sessions. Nonetheless, they can be of use to instructors to provide detail on how some individual sessions may unfold and how discussions can be managed. This empirical video data serves as a useful additional source of guidance for the users of the manual.

APPENDICES

APPENDIX A

WORKSHOP SCHEDULE & ASSIGNMENTS

# CASE TEACHING WORKSHOP

## Assignments & Schedule

### MONDAY EVENING PREPARATION

#### Readings:

- "Teachers Also Must Learn", Charles Gragg, pp.60-67\*
- "Because Wisdom Can't Be Told", Charles Gragg

Case: The Offended Colonel pp.131-132

#### Suggested Study Questions

1. What is your diagnosis of the situation?  
What's happening? Why?
2. What should Ben do immediately? later?

\*All page numbers refer to the Christensen and Hansen text

**TUESDAY, 17 MARCH**

**INTRODUCTION TO CASE TEACHING**

8:30- 8:45      Introductory Remarks  
                    Statement of Objectives  
                    Study Group Assignment

**THE LEARNING CONTRACT**

8:45- 9:45      Study Group Discussion  
                    Case: The Offended Colonel

9:45-10:00      Coffee Break

10:00-11:30     Plenary Discussion  
                    Case: The Offended Colonel

**TEACHING SKILLS: QUESTIONING & LISTENING**

11:30-12:30     Individual Preparation  
                    Case: Assistant Professor Graham and Ms. Macomber pp.158-159

**Suggested Study Questions**

1. What is your diagnosis of the situation confronting Professor Charles Graham as of the end of the class?

2. Should Professor Graham "stop by" the group gathered around Janet at the end of the class?

12:30- 1:30      Lunch

1:30- 2:00      Individual Preparation  
                    Readings: "Active Listening", Carl Rogers & Richard Farson,  
                    pp.166-174

2:00- 3:30      Plenary Discussion  
                    Case: Assistant Professor Graham and Ms. Macomber

3:30- 3:45      Coffee Break

3:45- 5:00      Discussion Debriefing

5:00- 5:15      Explanation of Assignments for Wednesday

## DISCUSSION DYNAMICS: DIRECTION & CONTROL

### TUESDAY EVENING PREPARATION

#### Readings:

"Preparing for Class", pp.38-40

Case: Ernie Budding (A and B), pp.147-154

Case: The Section Just Took Over, pp.184-186

#### Suggested Study Questions for Ernie Budding Cases

1. What is your appraisal of the situation confronting Ernie Budding as of the end of the "A" case? How does Ernie "see" the situation? How might a member of the class explain Section I's behavior?
2. What is your evaluation of Ernie's "speech"? (Case B)
3. How do you interpret the class reaction to his comments? Would you, as Ernie Budding, take any further action before the next class?

#### Optional Reading:

"Questioning", Kasulis

**WEDNESDAY, 18 MARCH**

8:30-10:00 Plenary Discussion  
Case: Ernie Budding (A and B)

10:00-10:15 Coffee Break

10:15-11:45 Discussion Debriefing

**TEACHING PRACTICUMS**

11:45-12:30 Practicum Preparation in Study Groups  
Case: The Section Just Took Over

12:30- 1:30 Lunch

1:30- 2:00 Practicum Preparation in Study Groups  
Case: The Section Just Took Over

2:00- 3:30 Plenary Session Practicum  
Case: The Section Just Took Over

3:30- 3:45 Coffee Break

3:45- 5:30 Debriefing of Discussion

**WEDNESDAY EVENING PREPARATION**

**Readings:**

"How I Taught Myself to Teach", Selma Wasserman, pp.175-184

"Teachers on Self-Management: Mirroring in the Classroom", Hansen

**Case: FPMT Case**

**Preparation in Study Groups**

**THURSDAY, 19 MARCH**

**8:30-10:00** Plenary Discussion Practicum  
FPMT Case

**10:00-10:15** Coffee Break

**10:15-12:00** Debriefing of Discussion

**12:00-12:30** Individual Preparation

**Readings:**

**"Seven Questions for Testing My Teaching", Laura Nash,  
pp.123-124**

**"The Dreaded Discussion: Ten Ways to Start", Peter  
Frederick, pp.211-216**

**Cases: Minicases**

**12:30- 1:30** Lunch

**1:30- 3:00** Plenary Discussion  
Minicases

**3:00- 3:15** Coffee Break

**3:15- 5:00** Collective Forum

APPENDIX

B

INTRODUCTORY MEMO TO PARTICIPANTS

March 9, 1987

TO: Case Teaching Workshop Participants  
FROM: Jim Austin, Mary Anderson, Catherine Overholt  
RE: Workshop Preparation

We're delighted to be joining you in the Case Teaching Workshop and look forward to a stimulating three days together. The workshop process, like the case method itself, is a collective undertaking which will produce learning greater than the sum of the parts. Active engagement is essential to the learning process.

A fundamental requisite to making our classroom sessions productive is a thorough preparation of the cases and readings by each of you. Of equal importance is active participation in the discussions by everyone.

Specific reading assignments are indicated on your schedule. Tonight's assignment is:

Readings

"Teachers Also Must Learn"  
in Teaching and the Case Method, pp. 60-67.

"Because Wisdom Can't Be Told"  
(handout)

Case

"The Offended Colonel"  
in Teaching and the Case Method, pp. 131-132.

Study Questions

See your Workshop Schedule

Our days will be full. There is much to do and little time to do it. Punctuality will help us get the most out of our time together. We look forward to seeing you tomorrow at 8:30.

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APPENDIX

C

"BECAUSE WISDOM CAN'T BE TOLD"



## Because Wisdom Can't be Told

By Charles I. Gragg

*So he had grown rich at last, and thought to transmit to his only son all the cut-and-dried experience which he himself had purchased at the price of his lost illusions; a noble last illusion of age.*

Balzac

*The essential fact which makes the case system . . . an educational method of the greatest power is that it arouses the interest of the student by making him an active rather than a passive participant.*

Dean Donham

Students must be accepted as the important part of the academic picture. This article about the case system of instruction of the Harvard Graduate School of Business Administration is concerned therefore with the effects that the case system has upon students. The object is not to describe the cases themselves, the methods of their collection, or even the routine of their classroom use. For the benefit of those unfamiliar with business school cases, it is merely necessary to explain that, as now used, a case typically is a record of a business situation that *actually* has been faced by business executives, together with surrounding facts, opinions, and prejudices upon which executive decisions had to depend. These real and particularized cases are presented to students for considered analysis, open discussion, and final decision as to the type of action that should be taken. Day by day the number of atomic business situations thus brought before the students grows and forms a backlog for observing coherent patterns and drawing out general principles.

It can be said flatly that the mere act of listening to wise state-

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ments and sound advice does little for anyone. In the process of learning, the learner's dynamic cooperation is required. Such cooperation from students does not arise automatically, however. It has to be provided for and continually encouraged.

Thus, the key to an understanding of the Harvard Business School case plan of teaching is to be found in the fact that this plan dignifies and dramatizes student life by opening the way for students to make positive contributions to thought and, by so doing, to prepare themselves for action. Indeed, independent, constructive thinking on the part of students is essential to the sound operation of the plan. This result is achieved in two ways.

In the first place, students are provided with materials which make it possible for them to think purposefully. They are not given general theories or hypotheses to criticize. Rather, they are given the specific facts, the raw materials, out of which decisions have to be reached in life and from which they can realistically and usefully draw conclusions. This opportunity for students to make significant contributions is enhanced by the very nature of business management. Business management is not a technical but a human matter. It turns upon an understanding of how people—producers, bankers, investors, sellers, consumers—will respond to specific business actions, and the behavior of such groups always is changing, rapidly or slowly. Students, being people, and also being in the very stream of sociological trends, are in a particularly good position to anticipate and interpret popular reactions.

In the second place, the desired result of student participation is achieved by the opening of free channels of communication between students and students, and between students and teachers. The confidence the student can be given under the case system that he can, and is expected to, make contributions to the understanding of the group is a powerful encouragement to effort. The corollary fact that all members of the group are in the same situation provides the student with exercise in receiving as well as in giving out ideas. In short, true intercommunication is established.

In these facts lies the answer to the unique values of the case system, and from these facts also arise certain difficulties encountered in its use. It is not easy for students to accept the challenge of responsible activity in the face of realistic situations. Nor is it always easy for

teachers to preserve the needed openmindedness toward their students' contribution. Nevertheless, the very existence of the assumption, implicit in the case system, that students are in a position to and will exert themselves to think with a lively independence toward a useful end in itself provides a real stimulus. By the same token, the stage is so set as to simplify the teacher's task of encouraging students to participate actively in the process of learning. The students are given the raw materials and are expected to use them. The teacher, for his part, has every opportunity and reason to demonstrate an encouraging receptivity as well as to inform and guide.

Thinking out original answers to new problems or giving new interpretations to old problems is assumed in much undergraduate instruction to be an adult function and, as such, one properly denied to students. The task of the student commonly is taken to be one chiefly of familiarizing himself with accepted thoughts and accepted techniques, these to be actively used at some later time. The instruction period, in other words, often is regarded both by students and teachers as a time for absorption.

Thus many students entering graduate schools have become habituated to the role of the receiver. The time inevitably arrives, however, when young people must engage in practical action on their own responsibility. Students at professional schools have a little time—at the Harvard Graduate School of Business, two years—to achieve the transition from what may be described as a childlike dependence on parents and teachers to a state of what may be called dependable self-reliance.

If the hearts of the students entering a graduate school of business administration could be clearly read, it is likely there would be found in many a cherished hope that upon graduation, they would find positions of authority and power awaiting them. This is a carefully guarded hope, because for some reason there is a general feeling that it is an unseemly one for anyone to harbor. Yet, although the students who possess this hope may be said to be unrealistic under conditions as they exist, they cannot be said to be other than logical. For if a person is to occupy a humble position in the business hierarchy more or less permanently, he can make better use of two years of his time than spending it at a school of business administration. The apprentice system is open in a fuller way to the person who wishes to enter

business than it is to the person who seeks to work in the field of law or of medicine, for example. Except in a few instances, such as the plumbing and electrical trades, there are no restrictions on who can start in business, whereas budding doctors and lawyers must study for and pass their respective medical or bar exams first. And, if those who are to spend their lives as salespeople, floorwalkers, clerks, or minor officials have several years to devote to acquiring background, they are likely to find that study of sonnets, or operas, or fishing, or philosophy will be more sustaining to the soul than a broad knowledge of business operations.

The work of a graduate school of business consequently must be aimed at fitting students for administrative positions of importance. The qualities needed by business people in such positions are: the ability to see vividly the potential meanings and relationships of facts, both those facts having to do with persons and those having to do with things; capacity to make sound judgments on the basis of these perceptions; and skill in communicating their judgments to others so as to produce the desired results in the field of action. Business education, then, must be directed to developing in students these qualities of understanding, judgment, and communication leading to action.

Furthermore, since those who contemplate entering a graduate business school customarily have an alternative opportunity to enter business immediately, the business school must be able to do more for its students than could be accomplished in a corresponding period of actual business experience. Formal professional education necessarily postpones the time of responsible action. Yet a principal object of professional education is to accelerate the student's ability to act in mature fashion under conditions of responsibility. One who completes a professional course is expected to demonstrate a more mature judgment, or to demonstrate mature judgment at an earlier period, than the person who enters upon a career of action without benefit of formal training. The presumption in this situation obviously must be that it is possible to arrange programs of training in such a way as to do more than offset the effect of prolonging the student's period of ostensible immaturity.

It would be easy to accept the unanalyzed assumption that, by passing on to young people of intelligence the accumulated experience and wisdom of those who have made business their

study, the desired results could be achieved. Surely if more or less carefully selected young people were to begin their business careers with the advantage of having been provided with information and general principles in lectures and readings that it has taken others a lifetime to acquire and develop, they might be expected to have a decided head start over their less informed contemporaries.

This assumption, however, rests on another decidedly questionable one; namely, the assumption that it is possible by a simple process of telling to pass on knowledge in a useful form. This is a stumbling block of the ages. If the learning process is to be effective, something dynamic must take place in the learner. The truth of this statement becomes more and more apparent as the learner approaches the inevitable time when he or she must go into action.

We are all familiar with the popular belief that it is possible to learn how to act wisely only by experience—in the school of hard knocks. But everyone knows that, from a practical point of view, strict adherence to the literal meaning of this belief would have a decidedly limiting effect upon the extent of our learning. Time is all against it. So we all try to tell others what we know or what we think we know. A great part of our educational system, perhaps necessarily, rests on this basis. It is the simple, obvious way of passing the torch of culture from hand to hand.

Entirely aside from the seemingly sound logic of this course, there exists a natural and strong tendency for people to tell others what is what—how to think, or feel, or act. Often this tendency seems, to the one having it, like an urge to duty. A friend of ours, for example, may remark that he is worried because he doesn't seem to be getting anywhere with the president of the company. "He doesn't seem to know I'm around," our friend explains. Ah ha! We know the answer to that one and will tell our friend how to solve his problem. "Look here, old boy, the trouble with you is you are too shy. Just speak up, loudly and firmly. Tell him what's what. The old buzzard won't ignore you then!"

It is possible that our desire to pass on our knowledge springs in part from the fact that such activity places us, for the time being, in the superior position. From our earliest beginnings there have been people around to tell us what to do, to pass on to us their experience and wisdom. There is no little gratification in

turning the tables. For a while we will be the parents and someone else can be the child. It is only necessary to listen to a six-year-old lecturing a three-year-old to see vividly the strength of this pleasure.

Teachers, since it is their avowed objective to extend the knowledge boundaries of others, are particularly beset by the temptation to tell what they know—to point out right paths of thought and action. The areas in which their help is called for are ones they have penetrated many times. They have reflected, presumably, upon their subjects from all angles. They feel that they know the answers and, with unselfish abandon, they are willing to tell all. Their students thus will be saved all the time and effort it would have taken them to work things out for themselves, even granting they ever could work out such excellent answers.

Yet no amount of information, whether of theory or fact, in itself improves insight and judgment or increases ability to act wisely under conditions of responsibility. The same statistical tables covering all aspects of a business may be available to every officer of the organization. Nevertheless, it does not follow that it makes no difference to the business which officer makes the decisions. Likewise, the whole body of generally accepted business theory may be equally familiar to all executives, yet the decisions reached by the various individuals are unlikely to be the same or to have equal merit.

We cannot effectively use the insight and knowledge of others; it must be our own knowledge and insight that we use. If our friend, acting solely on our advice, undertakes to tell the president what is what, the chances are he will make himself conspicuous but not impressive. For him to use our words effectively, granting our diagnosis of the situation is sound, they must become his own through a process of active thought and feeling on his part. Then, if he agrees with us, he will be able to act as we suggest, not on our advice, but from his own heart. The outstanding virtue of the case system is that it is suited to inspiring activity, under realistic conditions, on the part of the students; it takes them out of the role of passive absorbers and makes them partners in the joint processes of learning and of furthering learning.

The case plan of instruction may be described as democratic in distinction to the telling method, which is in effect dictatorial or patriarchal. With the case method, all members of the academic group, teacher *and* students, are in

possession of the same basic materials in the light of which analyses are to be made and decisions arrived at. Each, therefore, has an identical opportunity to make a contribution to the body of principles governing business practice and policy. Business is not, at least not yet, an exact science. There is no single, demonstrably right answer to a business problem. For the student or business person it cannot be a matter of peeking in the back of a book to see if he has arrived at the right solution. In every business situation, there is always a reasonable possibility that the best answer has not yet been found—even by teachers.

Exercise of mature judgment obviously is inconsistent with a program of blindly carrying out someone else's instructions. Moreover, no matter how worthy those instructions may be, they cannot cover every exigency. Tommy's mother says: "On your way home from school never cross the street until the policeman tells you to and, when he does tell you to, run." Perhaps one day no policeman is there. Is Tommy to wait forever? Or, perhaps a driver fails to observe the policeman's signals. Is Tommy to dash under the speeding wheels?

So far as responsible activity in the business world is concerned, it is clear that a fund of readymade answers can be of little avail. Each situation is a new situation, requiring imaginative understanding as a prelude to sound judgment and action. The following sad limerick, aimed at describing what might happen to business students without benefit of cases, has been contributed by a friend who prefers to remain anonymous.

A student of business with tact  
Absorbed many answers he lacked.  
But acquiring a job,  
He said with a sob,  
"How *does* one fit answer to fact?"

A significant aspect of democracy in the classroom is that it provides a new axis for personal relationships. No longer is the situation that of the teacher on the one hand and a body of students on the other. The focus of the students' attention is transferred from the teacher to each other, their contemporaries. It is not a question of dealing more or less *en masse* with an elder; it is a question of dealing with a rather large number of equals whose criticisms must be faced and whose contributions need to be comprehended and used. Everyone is on a par and everyone is in competition. The basis is

provided for strong give and take both inside and outside the classroom. The valuable art of exchanging ideas with the object of building up some mutually satisfactory and superior notion is cultivated. Such an exchange stimulates thought, provides a lesson in how to learn from others, and also gives experience in effective transmission of one's own ideas.

Under the case system, the instructor's role is to assign the cases for discussion, to act as a responsible member of the group delegated to provoke argumentative thinking, and to guide discussion by his own contributions and questions toward points of major importance; and, if he chooses, to take a final position on the viewpoints which have been threshed out before him. The more powerful are the student arguments, the heavier is the burden on the instructor; he must understand and evaluate each contribution, many of which are new to him, regardless of how thoroughly he has studied the cases or how many times he has used them with previous classes. To the instructor, every class meeting is a new problem and a new opportunity both to learn and to help others to learn. The important question under these circumstances is not whether students' answers please the instructor, but whether they can support their views against the counterattacks and disagreements of others in the group, or, failing to do so, can accept cooperatively the merits of their antagonists' reasoning.

For both teachers and students, the disciplines of the case method of learning are severe. Sometimes the shock is devastating to students who previously have been dominated by patriarchal representatives and thus have been faced merely with the relatively simple task of more or less verbatim reception and repetition of facts and ideas. Not all students can bear the strain of thinking actively, of making independent judgments which may be challenged vigorously by their contemporaries. Many people will always prefer to have answers handed to them. Teachers, for their part, particularly those unused to the system, sometimes find it straining to leave the safe haven of dogmatism and meet their students on a democratic plane. The inherently dramatic and challenging character of the case system, however, although producing anxiety and confusion for the newcomer, also arouses his deep interest and leads him to make the effort required for adjustment.

In making the adjustment to the democratic disciplines of the case system, students typically

pass through at least three objectively discernible phases. The first phase is that of discovering the inability of the individual to think of everything that his fellow students can think of. In many instances, to be sure, the challenge to original thought is pleasing from the first. Yet perhaps more often confusion and a feeling of helplessness set in: "But it's so discouraging to prepare a case as well as I can and then listen for an hour in class to other students bringing out all sorts of interpretations and arguments that I had never thought of."

The second phase is that of accepting easily and without fear the need for cooperative help. During the last half of the first year and the first half of the second year, students learn to draw more and more fully upon each other's ideas in the working out of problems. Competition for high academic standing grows more keen, to be sure, but the mutual giving and taking of assistance ceases to be a matter of secret anguish. The students are making common cause and thereby learning the pleasure of group pooling of intellectual efforts.

The third and final phase in the march toward maturity usually comes well into the second year with the recognition that the instructors do not always or necessarily know the "best" answers and, even when they do seem to know them, that each student is free to present and hold to his own views. When this phase is reached, students are ready to make independent progress and to break new ground on their own account. They are operating as responsible members of the community, taking help, to be sure, from both contemporaries and elders, but making their own decisions without fear of disapproval or search for an authoritative crutch to lean upon.

This sequence of student development is not peculiar to the use of business cases. Other schools using the case system apparently have a similar experience so far as initial confusion among students is concerned. For instance, Dr. Redlich,<sup>1</sup> professor of law at the University of Vienna, investigated the case system of teaching law for the Carnegie Foundation and reported, in part, as follows:

I am just as positive that, if all first attempts are difficult, this is especially true of legal education

1. Josef Redlich, J.U.D. (Univ. Of Vienna) '91, Lecturer on Government, 1908-09; Godkin Lecturer, 1910-11; Professor of Comparative Public Law, 1926-29; Charles Stebbins Fairchild Professor of Comparative Public Law, 1929-35.

according to the case method. Eminent professors of law have repeatedly explained to me that it takes a long time before the excellent effects of instruction by law cases are evident. The beginners are, as a rule, rather confused by what is demanded of them in class, and usually for a considerable period only the particularly quick or talented students take part in the debate; but after some weeks or months, things become clearer to the others also . . . and there soon follows the hearty cooperation of the majority.<sup>2</sup>

An outstanding effect of the case system, in other words, is to put upon students the burden of independent thinking. The initial impact of such mental activity upon a mind not used to it has been described by Chekhov in the words of one of his characters in the story "Lights":

It appeared that I . . . had not mastered the technique of thinking, and that I was no more capable of managing my own brain than mending a watch. . . .

For the first time in my life I was really thinking eagerly and intensely, and that seemed to me so monstrous that I said to myself, "I am going off my head."

No method is foolproof. A badly handled case system cannot but be an academic horror. Improperly handled, a case is merely an elaborate means for confusing and boring students. If, moreover, the teacher insists on being a patriarch—with the only right answers—and if the teacher visualizes his or her task as one of forcing the students, the case facts, and his or her answers into an affectionate rapport—it will be found that the out-and-out lecture system is infinitely less costly and less straining to everyone concerned. Such use of cases perverts the unique characteristics of the system. The opportunity that this system provides the students, of reaching responsible judgments on the basis of an original analysis of the facts, is sacrificed.

In addition to the possibility that the case system will be misused, and so become merely a wasteful way of telling the students what the teacher thinks, it must be recognized that the case does not provide a perfect replica of a business situation. In the properly conducted class

using business cases, the students are put in the position of the executives who must arrive at definite conclusions to be followed by specific actions whose merits will be tested by resulting developments. There is no escaping the fact that the students' decisions are not tested in this way. As Winston Churchill is reported to have remarked recently, there is a great deal of difference between being responsible for an order which may lose several valuable ships and expressing an opinion without such responsibility. It is too much to expect that anything except experience can be exactly like experience.

Nevertheless, a training period that allows students this relative irresponsibility has great advantages. Serious students get the essential background for responsible decisions without the risks to themselves and to their industry that stem from amateurish action. They are led to active consideration of a tremendous number of diverse and related real situations, which it would take them at least a lifetime of experience to encounter, and they are thus given a basis for comparison and analysis when they enter upon their careers of business action.

The case system, properly used, initiates students into the ways of independent thought and responsible judgment. It faces them with situations which are not hypothetical but real. It places them in the active role, open to criticism from all sides. It puts the burden of understanding and judgment upon them. It provides them the occasion to deal constructively with their contemporaries and their elders. And, at least in the area of business, it gives them the stimulating opportunity to make contributions to learning. In short, students, if they wish, can act as adult members of a democratic community.

As for the teachers, the case method of instruction richly provides them with the basic means of research. Not only does the existence of a stream of recorded business experiences enable them to keep in touch with business life and to make continuous necessary modifications in their inductions and general conclusions, but in addition, the relations which the case system sets up between teacher and students give the teacher the continual benefit of fresh, imaginative points of view which always hold the possibility of true advance.

2. Quoted by C. F. Allen, in "The Case System for the Study of Law," from *Proceedings of the Society for the Promotion of Engineering Education*, Vol. 27, 1919, p. 55.

APPENDIX D

"THE OFFENDED CO. B)"



THE OFFENDED COLONEL (B)

As Ben Cheever scanned the classroom at the Commanding Officers' Senior Executive Institute, he read outrage in only the colonel's expression. But, on the other hand, none of the other participants had leaped to his own rescue. It occurred to him to ask the woman's opinion. Her face certainly conveyed no anger to Ben, and he was skeptical of the colonel's accuracy in speaking on her behalf. But Ben realized that she might not want to embarrass her colleague; his predicament might worsen.

Ben considered his colloquial style merely casual and the profanity it often included well within "normal bounds." Never, since he had first begun teaching as a graduate student, had anyone called his language offensive. Part of him was tempted to retort, "Hey, fellow, are you really serious? I learned this language from a Marine!" But he didn't want to insult a workshop participant. Nonetheless, he thought that apologizing might imply intimidation or shame on his part - neither of which he felt. Besides, apologizing might damage his dignity and lessen the group's respect.

The colonel's expression and stance clearly showed that he was expecting the apology he had demanded.

"Look, it would be hypocritical of me to say I'm sorry," Ben told him. "So I won't. This is the way I talk. I'm just being myself, and that's it."

The colonel stiffened. "If that's the case, well, I don't feel I care to stay." He began to make his way out of the row of seats. Another officer, also in uniform, arose and accompanied him from the room. No one else left, nor did anyone say anything.

After their exit, Ben continued the discussion, making no further reference to the exchange. Among those who came to speak with him directly after the session, the woman in question appeared to say that she certainly had not been offended by his language and had, furthermore, enjoyed the case

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This case was written by Dr. Abby Hansen, Research Associate, for the Developing Discussion Leadership Skills and the Teaching by the Case Method Seminars. Data were furnished by the involved participants. All names and some peripheral facts have been disguised.

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APPENDIX

E

"ASSISTANT PROFESSOR GRAHAM & MS MACOMBER (B) (C)"



## Assistant Professor Graham and Ms. Macomber (B)

*This case was written by a member of the 1977 Developing Discussion Leadership Skills Seminar under the supervision of C. Roland Christensen. While the case is based on data supplied by participants involved, all names and some peripheral facts have been disguised.*

Well, well." Professor Graham's words rang in Janet Macomber's ears.

She slumped back in her chair, feeling like a defendant released from hostile cross-examination. The ordeal was over but the verdict was still out. Janet had been disturbed that the class discussion had followed such a different track than her own analysis. It had taken all the courage she could muster to suggest the class was wrong and assert her own point of view.

Janet listened carefully to Professor Graham's closing remarks. To her dismay, he said nothing to indicate her approach had been right—or wrong. Was it possible that she had been completely off base? Had she made a fool of herself in front of the whole section?

Class was dismissed, and in the minutes before the next class began, Janet was surrounded by her sectionmates. Their comments ranged from good-natured teasing to open incredulity:

"You didn't really. . . . How long did it. . . . Hundreds of numbers. . . . Let me see. . . ." The capstone comment came from Peter Anderson, an already popular figure who usually sat with a group of cohorts in the middle of the right-hand bank of seats. "Janet, you really did it this time," he said, laughing. "We (indicating his colleagues) are going to call your achievement THE MACOMBER MEMORIAL MATRIX!"

Janet made a humorous reply, but inwardly she despaired. Just what I don't need, she thought. In the second week of school, to be typecast as a number-cruncher! I should be more careful in the future about sticking my neck out when I talk in class. She made a silent resolution: this won't happen again.



## Assistant Professor Graham and Ms. Macomber (C)

*This case was written by a member of the 1977 Developing Discussion Leadership Skills Seminar under the supervision of C. Roland Christensen. While the case is based on data supplied by participants involved, all names and some peripheral facts have been*

In the fifth week of the term, Professor Graham was going over his student class cards for first-year QAOM, tabulating notes on individual class participation. On the whole, the section's case discussions were shaping up pretty well. Individually and collectively, the class had come a long way in five weeks. Charles grinned: he supposed that, if surveyed, the class would say the same of him.

Halfway through the pile, Charles stopped at Janet Macomber's card. What, he wondered, is going on there?

In the first weeks of the term, Charles had marked Janet down as very promising. She had come to each class prepared and had participated eagerly in the discussions. Her comments had been intelligent, succinct, and to the point. And on that one occasion (Charles remembered with pleasure), Janet had performed an analytic *tour de force*, smashing the case wide open in the last minutes of the class.

Charles now counted the case as a watershed in the section's development. He remembered the first hour and ten minutes of that class as everything a case discussion should not be: floundering, disjointed, indecisive, and entirely irrelevant to the company's problems. Since that day, slowly but with increasing confidence, the section was pulling itself together and becoming (on good days) a working forum.

Janet Macomber's behavior was in abrupt contrast to that of the rest of the class. Charles could not fix exactly when the change had taken place, but Janet had become silent, ceasing to voluntarily take part in case discussions. She had begun arriving late to class (QAOM had been meeting after lunch); she no longer took her characteristic back row seat, but changed her position almost every

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APPENDIX

"COMMUNITY DISTRIBUTION REPORTS"

COMMUNITY DISTRIBUTION REPORTS (A)

In April 1985, Dr. Beatriz Lopez joined the Family Welfare Association (FWA) of the Latin American republic of Maracas as supervisor of the Contraceptive Community Distribution (CCD) Project. Being a young woman who had recently finished her year of rural service (1), Beatriz had been recommended by the physician who was the director of one of the family planning clinics operated by the FWA.

In her new job, Beatriz was responsible for analyzing the plans and reports submitted by the five community workers (CWs) who reported to her, identifying problems in achieving goals and objectives, and taking the remedial actions she deemed necessary. For instance, she could reassign a CW to new areas in order to achieve wider population coverage, or she could recommend hiring new CWs or dismissing those who were not performing their tasks adequately. She had to visit each CW at least once a month and work with him or her in the formulation of plans to visit rural communities. Food and transportation expenses were reimbursed by the FWA.

The CCD Project had been started in 1980 in two rural provinces of the country and had been expanded to cover seven provinces in 1985. The program's objective was to provide

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(1) : All graduates of medicine in Maracas were required to spend one year lending their services at a rural health post before being certified to practice medicine.

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This case was prepared by John C. Ickis, Full Professor, Instituto Centroamericano de Administración de Empresas (INCAE), as a basis for class discussion rather than to illustrate -- either effective or ineffective handling of an administrative situation. Case writing sponsored by The Family Planning Management training Project.

Translated by Luis Delgadillo, INCAE, Alajuela, Costa Rica, - September, 1986.

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information and contraceptive methods to those villages which, for geographic, economic, or cultural reasons, did not have easy access to family planning clinical services which existed in the country. The population was provided with contraceptives through voluntary distributors who charged for contraceptives according to the following table:

<u>Method</u>	<u>Price to User</u>	<u>Retained by Distributor</u>	<u>Returned to FWA</u>
Oral Contraceptives (cycle)	1.50 pesos	1.00	0.50
Condoms (each)	0.30	0.15	0.15
Foams	2.00	1.00	1.00
Vaginal Tablets	6.00	3.00	3.00

Generally, these distributors were well-known housewives in the community, with primary school education, who were themselves using a family planning method. They were selected and supervised by the CWs, who visited them at least once a month to replenish their stock of contraceptives.

Since the distributors were volunteers and had many responsibilities in their own homes, they were not expected to perform many promotional tasks. Their basic function was to distribute and collect, whereas CWs were suppose to give informative talks ("charlas") and pay door-to-door visits.

Until 1985, all CWs reported directly to the CCD Program Director. However, since the program had already expanded to include almost twenty CWs, it was necessary to create three supervisory positions, one of which had been recently filled by Beatriz.

One of the CWs who had made a deep impression on Beatriz because of her dynamism was Gloria Rodriguez. Gloria supervised some 52 voluntary distributors in four districts of the El Progreso Province, having a total population of 225 thousand. (See Exhibit 1).

In early May, Gloria submitted her "Report on Contraceptive Sales and Stocks in Community Distribution Posts" to Beatriz for her approval (see Exhibit 2). It was the first complete report that Beatriz had received and she wanted to study it thoroughly before discussing it with Gloria.

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(2) : One peso = US\$0.10

EXHIBIT 1

Summary of Statistics, El Progreso Province  
(Selected Departments)

<u>Department</u>	<u>Total Population</u>	<u>Women</u>	<u>Occupied Dwellings</u>
<u>El Progreso</u>			
Urban El Progreso <sup>1</sup>	105,283	52,376	22,116
Suburban El Progreso <sup>2</sup>	2,456	1,142	495
El Cambio	8,081	3,528	1,498
<u>El Guabo</u>			
Urban El Guabo	7,783	3,730	1,571
Suburban El Guabo <sup>6</sup>	5,775	2,508	1,129
Barbones	3,755	1,677	708
Tendales	5,759	2,457	1,205
<u>Pasaje</u>			
Urban Pasaje	26,773	12,922	5,143
Suburban Pasaje	3,582	1,660	767
Buenavista	3,898	1,764	809
Chilla	3,880	1,878	1,016
La Peana	2,091	925	389
Santa Elena	3,304	1,550	725
<u>Santa Rosa</u>			
Urban Santa Rosa	27,239	12,946	5,188
Suburban Santa Rosa	5,702	2,533	1,692
Buenavista	2,119	992	409
La Avanzada	3,849	1,645	684
Santa Cruz	684	308	118
La Victoria	2,454	1,074	451

<sup>1</sup> Includes posts 03, 08, 05, 04, 22, 17, 31, 33, 54, 41 (see Exhibit 2).

<sup>2</sup> Includes posts 49, 16, 25, 32

<sup>3</sup> Includes posts 47, 35, 23.

EXHIBIT 2  
COMMUNITY DISTRIBUTION PROJECT

REPORT ON CONTRACEPTIVE SALES AND STOCK IN DISTRIBUTION POSTS

01. PROVINCE: El Progreso 02. REGION: 02 03. NAME OF COMMUNITY WORKER Gloria Rodriguez MONTH: April YEAR: 1985

04. POST SITE	05. POST NUMBER	06. SALES								07. NEW DELIVERY								08. NEW STOCK							
		Pills			CONDOMS		Local Methods			Pills			CONDOMS		Local Methods			Pills			CONDOMS		Local Methods		
		NM	L	ND	↓	E	R	K	N	NM	L	ND	↓	E	R	K	N	NM	L	ND	↓	E	R	K	N
Suburban	49	33	6		6				30	20		10					39	24		20			2	1	2
Urban	03		20						15	20							15	20		16					1
Recinto 20 de enero	023								10	20		12					10	20		12					
Parroquia Barbones	046	-	23	8					20	25	16						20	27	16	12			2		1
Parroquia Victoria	006		17		12				10	20		24					10	23		24			1	1	
Pa <sup>a</sup> Buenavista	52	-	5			5	5	2									37	20		14	1	1	3		
Santa Elena	021	33	-	-	-				-	20										40					
Urbano	008		10		84	1	4	2				40					20	10		12					
Machaia	005	10	10		12	1			20	10		12					70	30		20					
Pto. Bolivar	004	30	30		10				30								5	14		20					
Pto. Bolivar	022		11		12				5	10		12					10	13							
Via al Pto.	017	7	7						10	10							31	1							
Via al Pto. Bolivar	031	3	3														20	25		16			1		
18 de Octubre	033		15	3			2		20								287	217	16	194	1	7	5	4	
09. TOTAL UNITS		116	157	11	136	7	11	4	170	155	16	110													
10. UNIT VALUE		5	5	5	1.5	20	30	10																	
11. TOTAL VALUE		580	785	55	204	70	330	40																	
12. GRAND TOTAL		5786 <del>2064</del>								451								730							

ORIGINAL : Supervisor

COPY 1 : Evaluation

COPY 2 : Community Worker

Signature of Community Worker

Supervisor's OK.

Formul: D.C.A. 04.

\* These initials refer to the three types of pills (NM, L, ND) and Four of local methods (E, R, K, N) distributed by the FWA.

**Best Available Document**

EXHIBIT 2 (Cont.)

COMMUNITY DISTRIBUTION PROJECT

REPORT ON CONTRACEPTIVE SALES AND STOCK IN DISTRIBUTION POSTS

01. PROVINCE: El Progreso 02. REGION: 02 03. NAME OF COMMUNITY WORKER Gloria Rodríguez MONTH: April YEAR: 05

04. POST SITE	05. POST NUMBER	06. SALES								07. NEW DELIVERY								08. NEW STOCK									
		Pills		CONDOMS		Local Methods				Pills		CONDOMS		Local Methods				Pills		CONDOMS		Local Methods					
		NM	L	ND	↓	E	R	K	N	NM	L	ND	↓	E	R	K	N	NM	L	ND	↓	E	R	K	N		
El Basurero	016		20						10	20							10	20									
Brisas del Mar	054	32	8			2			20	10				2			38	22					3				
Suburbio	025		14	24	18			2	10	20		10					10	20	12	10		2	1	2			
El Cambic	027	36	17		12				30	20		12					44	31		20							
Santa Cruz Parroqui	044		6	4	2				10	10		9					10	13		10					1		
Tendales Guabo	037		45	10					25	28							25	28		12					1		
Guabo	014	2	16		26		2	2		20		60					18	24		60	2		2	-			
Guabo	048	7	11						1	8	15		12				16	18		12			1	1			
Guabc	011	5	6	3					10								15	10		8							
Baro Alto Guabo	47		1	13					20			20					20	11		20							
Suburbio	35	33	26		70				30	20		30					37	24		60							
Suburbio Machala	32		2	7	20				10			20					10	13		40		1		1			
Guabo (Barrio 20 En.)	23	5	20		12				10	25		20					15	25		20							
Machala	41	9	20	11	200					15	15	100						15		100							
09. TOTAL UNITS		129	212	72	360		4	2	4	193	216	15	293		2		254	274		372	2	6	5	5			
10. UNIT VALUE		5	5	5	1.5		10	10	30																		
11. TOTAL VALUE		645	1060	360	390 540		40	20	120																		
12. GRAND TOTAL		\$ 2,064 2635								13. GRAND TOTAL	464 719								14. GRAND TOTAL	976							

ORIGINAL: Supervisor  
 COPY 1: Evaluation  
 COPY 2: Community Worker

Signature of Community Worker

Supervisor's O.K.

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EXHIBIT 2 (Cont.)

COMMUNITY DISTRIBUTION PROJECT

MONTHLY REPORT OF COMMUNITY WORKER EDUCATIONAL ACTIVITIES

REGION: EL PROGRESO PROVINCE: 02 CW's NAME: Gloria Rodríguez MONTH: April YEAR: 1985

DATE	SITES	N° of Distributors		N° of Talks	ATTENDANCE AT TALKS				Home Visits		N° of Projections	N° of People Attending Projections
		New	Active		N° of Adults		N° of Young People		N° of Visits	N° of People Visited		
					M	F	M	F				
1 Monday	Home Motivations and follow-up in al #01,02,03		3						20	20		
2 Tuesd.	Machaia follow-up and home visits #036,033,028		3						20	20		
3 Wednsd.	Home Motivations								10	10		
4 Thursd.	Collection, follow-up #049 and home motivations		1						10	10		
8 Monday	Talk and motivation at SOLCA and new post in rural precinct of Guabo district	1		1	4	36		-			1	40
9 Tuesd.	Talk at Machala's Teofilo Davila Hospital			1	20	60	10	10			1	100
9 "	Supervisor's Talk in Maternity Ward				2	20	-	-			1	22
9 "	Follow-up 021, 025,026		3									
10 Wedn.	Follow-up #011 051 046 in rural town and Guabo and collection		3									
TOTALS			13	2	26	116	10	10	60	60	3	162

ORIGINAL: Coordinator  
 COPY 1: Supervisor  
 COPY 2: Evaluation  
 COPY 3: Community Worker

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**NEW DISTRIBUTION POST**

Date	Name of Distributor	Address	Reason	Place	Class of Premises
8 Ap 85	Carmita Sicalima Cao- Tillo (Dist 2.3)	B. 20 Enero (La Bocaton)	Calleabra- Tion	Gueabr	Home

**DISTRIBUTION POST CLOSED**

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Observation:

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COMMUNITY DISTRIBUTION PROJECT

MONTHLY REPORT OF COMMUNITY WORKER EDUCATIONAL ACTIVITIES

REGION: EL PROGRESO

PROVINCE: 02

CW's NAME: Gloria Rodríguez

MONTH: April

YEAR: 1985

DATE	SITES	N° of Distributors		N° of Talks	ATTENDANCE AT TALKS				Home Visits		N° of Projections	N° of People Attending Projections
		New	Active		N° of Adults		N° of Young People		N° of Visits	N° of People Visited		
					M	F	M	F				
11 Thurs.	Follow-up in rural towns 06, 052, collection and 029		3									
11 "	Talk in rural precinct of Guabo District, 8:00 PM and film projection			1	30	30	20	10			2	90
12 Frid.	Talk and film projection at Teófilo Dávila Hospital			1	10	40		16			1	66
12 "	Supervisor's talk and projection in Maternity Ward				2	20						22
13 "	Follow-up and collection 021 and 008 and 026		3									
15 Mond.	Follow-up and collection in Pto. Bolívar and home motivation 010, 004, 022, but they were not home		3						10	10		
16 Tuesd	Talk in Solca, follow-up and collection 05,04,022,017,008,07		3		2	40						42
TOTALS	(3 absent)		12	2	44	130	20	26	10	10	3	220

ORIGINAL: Coordinator  
 COPY 1: Supervisor  
 COPY 2: Evaluation  
 COPY 3: Community Worker

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COMMUNITY DISTRIBUTION PROJECTMONTHLY REPORT OF COMMUNITY WORKER EDUCATIONAL ACTIVITIES

REGION: EL PROGRESO

PROVINCE: 02

CW's NAME: Gloria Rodríguez

MONTH: April

YEAR: 1985

DATE	SITES	N° of Distributors		N° of Talks	ATTENDANCE AT TALKS				Home Visits		N° of Projections	N° of People Attending Projections
		New	Active		N° of Adults		N° of Young People		N° of Visits	N° of People Visited		
					M	F	M	F				
22 Mond.	Talk in Solca and follow-up			1		28		3				31
	#026, 028, 036, 039		4									
24 Wedn.	Follow-up and motivation 049,											
	050, 023 in Guabo and Machala		3									
25 Thurs.	With the help of health inspec-											
	tors we broadcasted to the town											
	of Bajo Alto to give a talk in											
	the evening, but it was not											
	possible because the power was											
	out since 6:00 PM											
	Follow-up #046		1									
27 Fri.d.	Machala, Guabo 026 033		2									
29 Mond.	Rural towns of Pasaje, but they											
	were not home and follow-up in											
	Pasaje and Ferry #041,018,001		3									
30 Tuesd.	Follow-up and collection and re-											
	port submitting											
TOTALS			13			28		3				31

ORIGINAL: Coordinator  
 COPY 1: Supervisor  
 COPY 2: Evaluation  
 COPY 3: Community Worker

COMMUNITY DISTRIBUTION REPORTS (B)

After having received Gloria Rodriguez's report for the month of April (refer to case A, Exhibit 2), Beatriz Lopez spent all afternoon trying to reorder the information in such a way that would allow her to measure the results of the CCD Project in the four El Progreso districts. It was not an easy task, for several reasons:

- Census statistics did not always coincide with areas covered by distribution posts.
- There were not enough columns in the form to record sales, deliveries, etc. of the various types of oral contraceptives sold; thus it was necessary to use one of the columns.
- The use of family planning services offered by other institutions, such as the Ministry of Health and the Social Security, was not known.

Beatriz took the report home and continued to work that evening on the analysis, producing in the early hours a table of comparison between target and covered population (see Exhibit 1).

-----  
This case was prepared by John C. Ickis, Full Professor, Instituto Centroamericano de Administración de Empresas (INCAE), as a basis for class discussion rather than to illustrate either effective or ineffective handling of an administrative situation. Case writing sponsored by The Family Planning Management training Project.

Translated by Luis Delgadillo, INCAE, Alajuela, Costa Rica, September, 1986.

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Costa Rica.

Upon arriving in her office the following morning, she learned from the Clinic Director that there was an evaluation section at FWA headquarters in charge of producing monthly analytical tables. On the one hand, she was upset for not having known that earlier so she could have saved herself a night of work, but on the other hand she felt relieved for not having to repeat the same work with the reports from the other CWs.

In late May, on a trip to the capital city, Beatriz managed to get copies of the tables prepared by the evaluation section for the month of April on "Supervision, Supply and Sales Tasks" (Exhibit 2) and "Educational Tasks" (Exhibit 3). At the same time, she took the opportunity to obtain the same tables for the previous month, March (see Exhibits 4 and 5). She was hoping that the tables produced by the evaluation section would help her detect successes and problems in the two provinces she was in charge of. She was especially interested in the possibility of being able to detect some relationship between promotional activities and contraceptive sales.

EXHIBIT 1

ANALYTICAL TABLE

(Prepared by Gloria)

Post	Sales of Pills	Educ. Activ. 1	Couples of Fertile Age <sup>2</sup>	Coverage
<b>Urban El Progreso:</b>				
03	20	M. F.		
08	10	F		
05	20			
04	60	M		
22	11	M		
17	14			
31	6			
33	18	M. E.		
54	40			
41	40			
	<u>239</u>		<u>22,116</u>	<u>0.9%</u>
<b>Suburban El Progreso:</b>				
49	39	M. F.		
16	20			
25	38	F		
32	9			
	<u>106</u>		<u>495</u>	<u>21.4%</u>
<b>El Cambio:</b>				
27	53		1,498	3.5%
<b>Urban Guabo:</b>				
14	18			
48	18			
11	14	F		
	<u>50</u>		<u>1,571</u>	<u>3.2%</u>
<b>Suburban Guabo:</b>				
47	14	C		
35	59	C		
23	25	C		
	<u>98</u>		<u>767</u>	<u>12.8%</u>
<b>Borrones:</b>				
46	31	F		4.4%
<b>Tendales:</b>				
37	55		1,205	4.6%

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EXHIBIT 1 (Cont.)

		Sales of Pills	Activi. Educ.	Couples of Fertile Age	Coverage
Buenavista	52	5	F	809	0.6%
Sta. Elena	21	53	F	725	4.6%
Sta. Cruz	44	10		118	6.5%
La Victoria	06	17	F	451	3.8%
Total		<u>697</u>		30,463	2.3%

- <sup>1</sup> M = Home-to-home motivation (new users);  
F = Follow-up (present users or deserters);  
C = Talk ("charla")

<sup>2</sup> Estimate of couples of fertile age based on number of occupied dwellings.

EXHIBIT 2

MONTHLY REPORT: SUPERVISION, SUPPLY, AND CONTRACEPTIVE SALES TASKS

(April, 1985)

Province:	El Progreso		La Sierra			
	Community Worker:	<u>Gladys Palacios</u>	<u>Gloria Rodriguez</u>	<u>Manuel Alvarado</u>	<u>Maria Llanos</u>	<u>Elena Morales</u>
1. Number of Active Posts		48	52	29	46	40
Goal according to Agreement*		45	45	45	45	45
Active posts as a percentage of goal		107%	116%	14%	102%	89
2. Number of supervised posts		17	28	23	26	26
Total supervised posts as a percentage of total active distributors		35%	54%	79%	57%	65%
3. <u>Contraceptives Sales</u>						
- Oral Contraceptives		329	697	142	182	70
Goal according to Agreement		255	420	345	390	390
O.C. sales as a percentage of goal		129%	166%	41%	47%	18%
- Foams		5	-	3	-	-
- Jellies		2	19	4	1	6
- Tablets		8	13	7	13	2
- Condoms		353	496	470	577	200
Goal according to Agreement		68	112	92	104	104
Condom sales as a percentage of goal:		519%	443%	510%	555%	192%

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EXHIBIT 2 (Cont.)

Province:	EL Progreso		La Sierra		
	Community Worker:	<u>Gladys Palacios</u>	<u>Gloria Rodriguez</u>	<u>Manuel Alvarado</u>	<u>Maria Llanos</u>
<b>4. <u>Distribution Posts not meeting the Contraceptive Sales Goal according to Agreement</u></b>					
- Oral Contraceptives	5	10	7	15	25
Total O.C. as a percentage of total supervised posts:	29%	36%	30%	58%	96%
- Condoms	8	14	8	9	22
Total condoms as a percentage of total supervised posts:	47%	50%	35%	35%	85%
<b>5. <u>Distribution Posts Out of Stock on the date of Supervision Visit:</u></b>					
- Oral Contraceptives	2	13	13	4	16
Total out-of-stock posts in O.C. as a percentage of total supervised posts:	12%	46%	57%	15%	62%
- Condoms	6	16	13	10	5
Total out-of-stock posts in condoms as a percentage of total supervised posts	35%	57%	57%	38%	19%

EXHIBIT 2 (Cont.)

Province:	EL Progreso		La Sierra		
	Community Worker:				
	<u>Gladys Palacios</u>	<u>Gloria Rodriguez</u>	<u>Manuel Alvarado</u>	<u>Maria Llanos</u>	<u>Elena Morales</u>
6. <u>Distribution Posts that although out of stock on the date of the supervision visit, were not provided with contraceptive material</u>					
- Oral Contraceptives	-	2	-	1	7
Total posts not provided with material as a percentage of total supervised posts:	-	7%	-	4%	27%
- Condoms	4	6	-	1	12
Total posts not provided with material as a percentage of total supervised posts:	24%	21%	-	4%	46%
7. <u>Distribution Posts Open:</u>	1	-	2	6	6
8. <u>Distribution Posts Closed:</u>	-	-	-	3	-
9. <u>Distribution Posts that have sold over 50 Oral Contraceptives cycles</u>	-	5	1	-	-
10. <u>Distribution Posts that have sold over 25 condoms:</u>	5	8%	9	7	4

\* According to an Agreement recently signed by the FWA with an international organization, at each distribution point a minimum of 15 O.C. cycles and 4 condoms had to be sold. Also, a minimum of 45 distribution posts per community worker had been established.

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EXHIBIT 3

MONTHLY REPORT: EDUCATIONAL TASKS

(April, 1985)

Community Workers	Number of Talks	Persons Attending				Total Attendance		Number of home motivations	Number of persons motivated	Motivation goal according to work plan*	Persons motivated as a percent of goal
		Adults		Young People		M	W				
		Men	Women	Men	Women						
<u>Progreso Province</u>											
Ladys Palacios	2	20	45	8	10	28	55	149	168	130	115%
Lidia Rodríguez	5	70	274	30	39	100	313	70	70	130	54%
<u>Total El Progreso Province</u>											
	7	90	319	38	49	128	368	219	238	260	84%
<u>La Sierra Province</u>											
Manuel Alvarado	5	120	135	-	-	120	135	285	300	130	219%
María Llanos	1	3	20	1	14	4	34	166	262	130	128%
Lidia Morales	2	80	20	5	2	85	22	335	532	130	258%
<u>Total La Sierra Province</u>											
	8	203	175	6	16	209	191	786	1.094	390	202%

\*): Each CW received a work plan for the year, with monthly goals of home motivations being set by headquarters.

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EXHIBIT 4

MONTHLY REPORT: SUPERVISION, SUPPLY AND CONTRACEPTIVE SALES TASKS

(March, 1985)

Province:	EL PROGRESO		La Sierra		
	<u>Gladys Palacios</u>	<u>Gloria Rodriguez</u>	<u>Manuel Alvarado</u>	<u>Maria Llanos</u>	<u>Elena Morales</u>
Community Worker:					
1. Number of Active Posts	48	52	27	43	34
Goal according to Agreement*	45	45	45	45	45
Active posts as a percentage of goal:	107%	116%	60%	96%	75%
2. Number of supervised posts	22	25	20	19	21
Total supervised posts as a percentage of total active distributors	46%	48%	74%	42%	62%
3. <u>Contraceptive Sales</u>					
- Oral Contraceptives	386	917	309	161	223
Goal according to Agreement	330	375	300	270	315
O.C. sales as a percentage of goal:	117%	245%	103%	60%	71%
- Foams	3	1	3	1	4
- Jellies	4	10	2	-	-
- Tablets	8	30	8	7	14
- Condoms	376	446	308	635	629
Goal according to Agreement	88	100	80	72	84
Condom sales as a percentage of goal:	427%	426%	385%	882%	749%

\* According to an Agreement signed by the FWA with an international organization, at each distribution point a minimum of 15 O.C. cycles and 4 condoms had to be sold. Also, a minimum of 45 distribution posts per community worker had been established

EXHIBIT 4 (Cont.)

Province:	EL PROGRESO		LA SIERRA		
	Community Worker:	Gladys Palacios	Gloria Rodriguez	Manuel Alvarado	Maria Llanos
<u>4. Distribution posts not meeting contraceptive sales goal according to Agreement</u>					
- Oral Contraceptives	11	5	5	5	16
Total O.C. as a percentage of total supervised posts:	50%	20%	25%	28%	76%
- Condoms	11	13	6	2	2
Total condoms as a percentage of total supervised posts:	50%	52%	30%	11%	21%
<u>5. Distribution Posts out of stock on the date of Supervision Visit</u>					
- Oral Contraceptives	2	8	10*	Unknow for Maria Llanos and E. Morales because they reported on the old form	
Total out-of-stock posts in O.C. as a percentage of total supervised posts:	9%	32%	50%		
- Condoms	3	9	8	Unknown because reported on the old form	
Total out-of-stock post in condoms as a percentage of total supervised posts:	14%	36%	40%	-	-

55

EXHIBIT 4 (Cont.)

Province:	<u>EL PROGRESO</u>		<u>LA SIERRA</u>			
	Community Worker:	Gladys Palacios	Gloria Rodriguez	Manuel Alvarado	Marfa Llanos	Elena Morales
6. <u>Distribution Posts that although were out of stock on the date of the supervision visit, were not provided with contraceptive material</u>						
- Oral Contraceptives	-	-	-	Unknown for both community workers since they reported using the old form		
Total posts not provided with material as a percentage of total supervised posts:	-	-	-	-	-	
- Condoms	-	10	2	Unknown because they reported using the old form		
Total posts not provided with material as a percentage of total supervised posts:	-	40%	10%	-	-	
7. Distribution Post Open	-	1	6 (Number of distribution posts not indicated)	These community workers did not submit the report on educational tasks - showing distribution posts opened and closed		
8. Distribution Posts Closed:	4 (Number not shown)	2				
9. Distribution posts that have sold over 50 oral contraceptive cycles	-	12	-	1	1	
10. Distribution posts that have sold over 25 condoms	5	6	5	11	9	

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EXHIBIT 5

MONTHLY REPORT: EDUCATIONAL TASKS

(March, 1985)

<u>Community Workers</u>	<u>Number of Talks</u>	<u>Persons Attending</u>				<u>Total Attendance</u>		<u>Number of home motivations</u>	<u>Number of persons motivated</u>	<u>Motivation goal according to work plan*</u>	<u>Persons motivate as a percenta of goal</u>
		<u>Adults</u>		<u>Young People</u>		<u>M</u>	<u>W</u>				
		<u>Men</u>	<u>Women</u>	<u>Men</u>	<u>Women</u>						
<u>El Progreso Province</u>											
Judys Palacios	3	9	40	11	35	20	75	104	188	136	76%
Lidia Rodríguez	2	5	52	-	12	5	64	168	156	136	115%
<b>Total El Progreso Province</b>	<b>5</b>	<b>14</b>	<b>92</b>	<b>11</b>	<b>47</b>	<b>25</b>	<b>139</b>	<b>272</b>	<b>344</b>	<b>272</b>	<b>100%</b>
<u>La Sierra Province</u>											
Manuel Alvarado	9	36	100	5	239	41	339	295	403	136	217%
María Llanos	Data on educational tasks not reported										
Elena Morales	Data on educational tasks not reported										
<b>Total La Sierra Province</b>	<b>9</b>	<b>36</b>	<b>100</b>	<b>5</b>	<b>239</b>	<b>41</b>	<b>339</b>	<b>295</b>	<b>403</b>	<b>136</b>	<b>217%</b>

\*) : Each CW received a work plan for the year, with monthly goals of home motivations being set by headquarters.

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APPENDIX

G

MINI-CASES

## THE INTERLOPER

The second case discussion of the Women in Development workshop had gotten off to a good start. The case was an interesting one on informal labor markets and employment generation opportunities for women in Bangladesh. It had captured the attention of most everyone. While the morning's first case discussion had proceeded rather slowly, the participants seemed to have warmed up to the case method and Dr. Redding was pleased with the lively discussion that was ensuing.

The workshop participants had arrived the night before. They represented a cross-section of sectors and expertise in their large development agency, and the group of participants included a labor expert from Bangladesh. Very few of the individuals knew each other, but because they were a small group of only 15, they had gained some intimacy with each other and with the workshop faculty over cocktails and dinner the previous evening.

Dr. Redding had guided the case discussion through about half the logic of the case. She was standing at the board with chalk in hand, when suddenly the labor expert leapt from his seat, strode to board and snatched the chalk from her hand with a pleasant "Do you mind?". He then launched into a five minute lecture on labor markets in Bangladesh, outlining his comments on the board. As he finished, he handed the chalk back to Dr. Redding and thanked her politely.

As she accepted the chalk, Dr. Redding quickly evaluated the lecture. The comments were tangential, at best, to the discussion that had been in process, and she considered how to proceed.

THE INSIDE EXPERT

The second in a series of Women and Development workshops was moving along very well. The workshop faculty were quite pleased with both the substance and tone of the discussions that had taken place. The participants, all senior level people from a large development agency, had a wide variety of experience and expertise in the developing world. The first workshop of the series had been well received and this group of participants had arrived eager to participate in an activity which had had "good press".

The plenary discussion for the third and final case of the workshop was nearly completed. The case described the design and rationale for proposed curriculum changes which were to be implemented at an agricultural college in Kenya. Several of the participants were known to have had considerable experience with agricultural projects in other African countries. Their comments had provided some valuable insights into the discussion. However, one of the senior officers from the East Africa Division remained silent throughout the case discussion.

As Professor Davidson decided to move towards closure of the discussion, the senior officer ~~from~~ raised her hand.

"I've spent a lot of time in Kenya, and frankly", she said, "I don't believe any of the information that is in this case".