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## Labor Education for Women Workers

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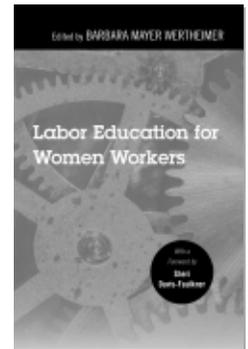
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## CHAPTER 10

# *Case Studies: How to Develop and Use Them*

By GLORIA BUSMAN

*A funny thing happened to me on the way to class . . . .*

Many women, returning to a structured learning situation after an absence of several years, do so with a number of doubts and a great deal of apprehension.

*. . . . What if I've forgotten how to study . . . . What if it's over my head  
. . . . What if it's boring . . . . What if it's all abstract theory that I'll never  
put to use . . . . What if the instructor doesn't know what it's like in my real  
world . . . . What if it's a waste of time . . . . WHAT IF I FAIL?*

Whether the concerns are based on self-doubt or on distrust of schools and teachers, they are real and widespread. The more quickly they are put to rest, the more positive the learning experience will be. The case study method, or reciting actual situations to illustrate a principle or theory, helps bring the subject matter into a familiar and comfortable framework.

All of us—not only instructors—make frequent use of case studies, although we may not so label them. Union representatives whose paths have not crossed for some time will mention how good it was to get together and “exchange war stories.” They could as accurately describe their conversation as “providing one another with recent case studies of typical (or unique) organizing campaigns, arbitrations, or negotiations.”

### *Advantages of the Case Study Method*

People have always relied on “case studies” to provide information or to persuade. Generals study earlier battles fought on similar terrain; parents use examples to reinforce predictions of dire consequences if a certain

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course of action is pursued; one friend reassures another faced with surgery or a family crisis by detailing personally known or experienced success stories of others who dealt with similar circumstances.

Industrial relations is my field. The people I instruct usually are—or hope to be—directly involved in applying what they learn in a setting that affects not only their welfare but that of others. This intensifies the students' desire for evidence that what they learn has practical, "real-life" value. I don't believe, however, that this is unique to my particular subject matter. A sense of relevance, immediacy, and personal involvement is achieved with specific examples in any course of study. A number of years ago, I was part of a group receiving a verbal report describing the results of an investigation conducted by a government commission on the ill effects of racial segregation. The speaker opened with a general summary of the findings. Some heads nodded in accord with most of the specifics; a few eyebrows were raised over new statistics. Interest built somewhat as the results of a survey were reported indicating that of the youngsters tested, a high percentage showed a dramatic increase in I.Q. scores after spending six months in an unsegregated environment. However, it was only when the story of one small black girl was told in detail that the group's attention reached and maintained a high point of concentration and concern. The earlier generalizations became meaningful, the statistics vitally important: if this had happened to the one child now known and cared about, what of all the others?

If case studies provide interest and a sense of relevance, that alone would seem to justify their occasional use. Most instructors would certainly prefer that their students be interested and find learning an enjoyable experience. But good case studies, effectively used, can accomplish a number of additional purposes. In teaching nearly any subject that has a "how to" factor, examples of situations involving use of the material being taught can not only point up the practicability of the course of study, but can provide a valuable and informal way of testing how well the information is being received.

Suppose, for instance, that an instructor has lectured at length on the importance of adequately interrogating and preparing witnesses prior to calling them to testify in arbitration. A report of an actual arbitration is then presented in which surprise testimony develops under cross-examination. In class discussion of the arbitrator's award, if students do not bring up the witness's startling revelation, or if the only response to a question from the teacher concerning the surprise testimony is that "the other side never should have called that witness," the instructor had better look hard at how she presented her lecture material.

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In class discussion, comments, critiques and questions are often more to the point if they center on a problem where every member of the group starts from precisely the same set of facts, and where there is quick and easy access to specifics. Starting with one history of one set of circumstances, such as a case study provides, gives focus and direction to a discussion, but need not limit free-wheeling, creative shifts. Some of the most effective uses of case studies often turn on "what if just that one factor had been different . . . . If it hadn't been for . . . . Suppose the contract had read . . . ."

Classes seem to enjoy the challenge of pitting their wits against those of fate, an arbitrator, a jury, or the protagonist of a case study. Presenting the material up to the point when all the facts are known but the verdict or result is still unannounced, and then asking a class to predict the outcome, either in written or oral form, can lend excitement to a learning situation.

*Student-Developed Case Studies*

In teaching students to evaluate data objectively and thoroughly, a more ambitious use of the case study method is to ask each member of the group to develop a case study of her own. In teaching any aspect of industrial relations, this approach offers the class meaningful involvement not only with the subject matter but with practitioners in the field.

In such a project, students would be asked to work within their own union to learn all that they can about an organizing campaign, a set of negotiations, or a grievance resulting in arbitration, for example. They would be assigned to develop and record all data they considered relevant, including preliminary research that was (or should have been) conducted, the approaches used by both sides, and extraneous factors that may have affected the outcome, and then to report and analyze the outcome.

The instructor should have available willing contacts for any members of the class who have difficulty gathering information through their own unions. However, these contacts should be offered as a last resort; the steps involved in gaining permission to conduct such a study is a learning process in itself.

This sort of assignment is equally adaptable to a variety of other themes. Members of a speech class, for instance, might find it valuable to trace what happened from the time a professional lecturer received a request to address a certain group. How does she choose whether or not to accept, and whether or not the topic requested is appropriate for her? Does she begin research immediately, or first take time to gel in her own mind the approach she wishes to take? How does she accommodate the type of audience she will be addressing? What system of notes does she use? Does she

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plan to use an outline or a prepared text? Does she rehearse delivery? Does she vary her methods of preparation depending on whether the address will be televised and/or the proceedings published? Does she make a conscious attempt to evaluate her performance after presentation?

Assignments such as this have an extra benefit for future classes, as a compilation of case studies is developed for later use.

#### *Elements of the Case Study*

What elements comprise a case study that is useful for teaching purposes?

The person developing it should have knowledge of the generally accepted principles of the discipline involved.

She should be aware of whether the situation to be studied fits a common pattern, or is of value because of its unique aspects.

She should have available data dealing with the various perspectives of the participants involved in the case, and should include that data.

She should have access to records or other objective documentation of the events, and should make full use of that access.

She should include in her report details of any unforeseen or unusual circumstances that may have affected the outcome.

The study should include conclusions drawn by the participants—did the project succeed or fail (by whose standards)? What should, or could, have been done differently?

And finally, what can be learned from this particular history by others involved in a similar situation?

For me, as an instructor, the case studies most satisfying to present are developed from situations in which I have been directly involved. The primary advantage of self-conducted case studies is that there has been an opportunity to investigate and to include in the report all relevant aspects. Using other persons' material, I often find myself most interested in a facet of the study that is mentioned only briefly, or not at all. . . . *Did they also explore the feasibility of filing with EEOC? . . . How did the plant clericals feel about the situation? . . . Why didn't they introduce the pay stubs in evidence? . . .* The list can be endless. In addition to *my* questions, students often have separate lines of inquiry they'd like to explore. If I have been involved in the material I am presenting, the information, even if not in written form, is readily available.

Next best thing to relying on personal experience is to use that of friends and associates. Sometimes the probing, exploring, and digging can be done while the case is developing, by asking those involved to pursue areas that might not otherwise have occurred to them. If it's after the fact, at least

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there is ready access to a participant who may know or be able to seek out necessary additional information.

Another happy circumstance is finding a graduate student who wants to do research in an area where I am anxious to have case studies developed. The combination of my inquisitiveness and access to practitioners with the student's need for subjects has resulted in fresh, pertinent studies.

Documentary and training films are the most highly sophisticated presentation of case studies. If well done, a filmed dramatization of actual events can have greater impact than written or oral presentation of the same material.

*Selecting Case Study Materials*

There are, of course, published case studies in nearly every imaginable field. The UCLA library catalogue contains some 250 title cards starting with the magic words "Case Study in . . ." and covering such intriguing topics as "Insurgency and Revolutionary Warfare," "Panchayati raj," "Modes, Mechanisms and Effects of Failure Phenomena." Particular care needs to be taken in selecting and using case studies that were not developed for your purposes. One potential problem is timeliness. In industrial relations, where new precedents and policies are set almost daily, a case study that should be appropriate and useful may create more confusion than clarity if it predates a certain NLRB doctrine or a new public employee relations ordinance. Use of dated material can serve a purpose, but only if the instructor makes clear that certain aspects would not apply today. Also, regional differences exist; approaches and policies of different unions and different industries vary greatly.

If the material was not designed to illustrate the precise point to be made, there is a danger of the group being sidetracked or even drawing false conclusions from the study. This is a hazard no matter how appropriate the example used seems to be, even if it is the instructor's own.

I remember using the story of an actual representation hearing conducted by a regional office of the NLRB, to point up the necessity for organizers to obtain an exact count of the employees in a proposed bargaining unit, and also to know in detail the name and function of each classification of employees. I thought my case illustrated the point very well, since it involved an employer's attempt to exclude certain employees by claiming they were professional or supervisory. The union had wanted these people included in the bargaining unit, on the basis of actual job content as opposed to title, and had prevailed in its position. The board-ordered election had included among eligible voters employees who, by virtue of job title alone, would normally have been excluded.

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In response to a question from one of the students, I reiterated the job titles in question.

A few class sessions later, while setting forth the normal criteria for appropriate bargaining units, I saw some confused faces. A hand shot in the air, and I heard, "But you told us in X vs. Y that those sorts of classifications *were* included in the broader unit!" I had failed to prevent the students taking the wrong leap from a specific to a generality.

This is a key potential difficulty in case studies: because students find them interesting, they tend to pay closer attention to the stories than to the lectures, and details can be misapplied and over-generalized.

The American Arbitration Association has produced an excellent film version of a case history entitled *The Truth of the Matter*. It can be a fine tool for teaching the theory and practice of arbitration. However, it is a disservice to students to leave them with the impression that the film portrays a typical arbitration proceeding. In the film, both parties are represented by prestigious counsel. Adolph Koven, the arbitrator, is not only well known and admired by his peers, but is a unique personality who brings his own perspective and style to the arbitration process. There is a great deal to be learned from *The Truth of the Matter*, but students should not acquire an expectation that what they see is what is to be expected in all (or most) arbitrations.

A viewing of *Harlan County, U.S.A.* is a meaningful and insightful experience for any student of contemporary labor problems. The dramatic and courageous struggle of a group of southern miners and their wives to achieve dignity through union recognition is honestly and painstakingly depicted. In addition to being an outstanding film, it is an excellent case study. However, if it were the only case study presented, or even if others were used that lacked the emotional intensity of *Harlan County, U.S.A.*, students might well be left with a misconception as to the state of working conditions and labor relations. I am in no way suggesting that dramatic and unique case histories should not be presented. But the case study method is a tool, and, like any tool, it is most valuable when used appropriately, with care and skill.

### *The Instructor's Role*

Proper use, I believe, involves a great deal of preparation by the instructor. No matter how free-flowing the discussion following presentation of a case study, the instructor should provide direction and focus. Key questions must be asked, and, if the answers are not forthcoming from the group, answered in clear and explicit summary by the discussion leader.

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The concepts offered by a case study that are universal or involve basic principles should be so identified. Those that are of interest simply because they are unique should be pointed out as such.

A good case study has much in common with a good short story. The situation must be presented, the problem or crisis identified, action taken toward resolving the problem or crisis, and the results reported. The characters and the situation should have some universality, but they should not be so average as to be boring.

Because a case study is fact, not fiction, and because it is presented to reinforce a principle or illustrate a technique (as well as to entertain), the denouement or wrap-up is longer and more important. An English professor, leading a discussion of O. Henry's short story "Gift of the Magi" (in which a young, loving wife sells her long hair to buy a watch chain for her husband, while he sells his watch to purchase a comb for her beautiful hair), would not think to caution students against rushing to the hairdresser. By contrast, a psychology teacher presenting the same tale as a case history would undoubtedly discuss the advisability and implications of the couple's actions, and perhaps point out other examples of generous acts that backfired because of lack of communication.

Case studies enrich a learning situation. They are popular with students; they reassure students that the subject matter is relevant to the real world; they provide an informal means of measuring the effectiveness of teaching. But they do not, except in advanced courses where basic premises and principles have been mastered, take the place of presenting fundamental material essential to understanding the subject. Teachers who use the case study method should be careful to provide a sound base of information, and to use anecdotes (or case studies) to reinforce that base.

Meanwhile, did I tell you about the time when I . . . .